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ABSTRACT

This resource booklet is intended to present a new set of tools and procedures for making meetings more participative. It is aimed at anyone who plans programs, meetings, conferences, classes, workshops, seminars, or conventions--from corporation presidents to managers to youth group leaders. Unit 1 identifies some of the issues and problems related to increasing participation in meetings. Unit 2 reviews the similarities and differences among meetings. In unit 3, the steps for designing all types of meetings are listed, and unit 4 presents a checklist of things to remember in planning and conducting a meeting. Resources for improving meetings are presented in unit 5, and traps to avoid in planning and leading meetings are listed in unit 6. Unit 7 contains alternative ways to cope with typical problems. Unit 8 has illustrative designs, instruments, and procedures to use in meetings. Ways to make use of this resource booklet are presented in unit 9, and unit 10 is a selected bibliography. (Author/JM)

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TAKING YOUR MEETINGS OUT OF THE DOLDRUMS

by
Eva Schindler-Rainman
and
Ronald Lippitt
in collaboration with
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EA 013 320

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FOREWORD

There is no possible way to get accurate statistics on the number of meetings held in the world in the course of a year. They take place under such a wide variety of auspices – educational institutions, commercial enterprises, government agencies, voluntary associations – and for such a variety of purposes – learning, planning, negotiating, problem solving, decision making, adjudicating, socializing – that there is no way to keep tabs on them. But certainly they add up to many millions of person-hours annually. In fact, meetings are the principle means of getting human learning and work done.

In view of their importance as instruments of human endeavor it is tragic that most meetings are so bad. The main explanation for this being the case, as I see it, is that traditionally our meetings have followed one or both of two historical models: the lecturer-audience classroom model dating from the medieval school and the parliamentary model invented by English barons in the thirteenth century. The purpose of both models was to assure that those in power would maintain their control over those under them. Both models are characterized by rigid control by authority figures, formal rules, regulations, and procedures, and standardized rituals.

Perhaps these models served virtuous purposes at the time they were conceived. The classroom model provided an orderly means of transmitting knowledge before printing presses were invented; and the parliamentary model enabled the barons to restrain the tyranny of monarchs without relinquishing power to the vulgar masses. But as the concepts, values, and procedures of democracy began evolving in the late eighteenth century, these models began losing their relevance; and in the twentieth century they became totally dysfunctional.

What was needed was a new model to provide guidelines for human interactions that were more congruent with democratic ideals. To meet this criterion, a new model would need to possess these characteristics: (1) respect for personality, (2) participation in decision making, (3) freedom of expression and availability of information, and (4) mutuality of responsibility for defining goals, planning and conducting programs, and evaluating. Such a model has been emerging. In its educational context it is going under such labels as open learning, self-directed learning, community schools, and the like. In its organizational and political contexts it is going under such labels as participative management, shared management, participative democracy, decentralization, local control, and the like.

But we have had difficulty implementing this new model. Our meetings don't look much different from the way they did in the medieval classrooms and parliaments; decisions still tend to be made by the leadership and passively accepted by the followers. Except that the followers are getting bored and staying away from the meetings at which the leaders announce their decisions.

What has been needed is a new set of tools and procedures for making meetings more participative, for rescuing them from the doldrums. And this is what the authors of this book have assembled from the experience of scores of innovators

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who have been inventing and trying out new techniques for planning and conducting meetings for a number of years.

What they present here is **not** prescriptions – more rules and regulations – but resources containing principles to stimulate your own innovations and containing optional strategies for you to adapt to your own style. Its key adjectives – involving, stimulating, enjoyable, productive, exciting, motivating, satisfying – describe the kind of meetings you can have if you use its very practical guidelines and tools as resources.

Malcolm S. Knowles
Professor of Adult and Community College Education
North Carolina State University, Raleigh

JOIN US PLEASE!

We have had an absorbing, and often an "aha" time formulating our experiences about meetings and clarifying how to improve them. Many frustrations have been activated and analyzed. Many ideas that have worked have been integrated into our agenda for sharing with you.

As you can see, the agenda is a full and varied one: full of opportunities for you to add and enrich the wisdom about alternatives for taking all of our meetings "out of the doldrums". The dictionary definitions of doldrums, by the way, includes the phrases: "a dull and depressed condition", "the dumps", "a state of inactivity or stagnation", "place in the ocean where baffling calms and winds prevail". These notions sum up many of our experiences about a lot of meetings.

But in contrast, we have all shared the joy of productive, participative meetings where all of us become excited, motivated, lifted up, and committed, because of the sharing and interactions that went on between the participants. Also these meetings created significant changes in us and made impacts on the larger community.

We are convinced from our own experience that most meetings can be improved a great deal, and all meetings some. The time spent in using this resource kit, in planning your meetings more effectively, and in training others to plan theirs, may be the highest pay-off time you will spend as a "people-helper." We don't know of a more rewarding function than being an effective "meeting-helper."

So join us as we

- identify some of the problems and issues of getting participation in meetings. (Unit 1)
- review some of the similarities and differences of all meetings (Unit 2)
- go through the steps of designing all types of meetings (Unit 3)
- use a checklist reminder of things to remember in planning and conducting a meeting (Unit 4)
- scan a checklist of the kinds of resources there are for use in improving our meetings (Unit 5)
- remind ourselves of the traps we need to avoid in planning and leading meetings (Unit 6)
- have an opportunity to share with you some alternative ways to cope with typical problem situations (Unit 7)
- expand your repertoire with a toolkit of illustrative designs, instruments, and procedures for your meetings (Unit 8)
- help you develop and think about ways to use this resource (Unit 9)
- give you a selected bibliography (Unit 10)

We believe you'll be able to do much about the doldrums and problems in all the groups you are in touch with – and we hope you'll share your resources with us so we can pass them on. Just write to the publisher and we'll get your messages. Improving our meetings is one of the greatest things we can do for ourselves, our groups, our agency, and our democracy.

Eva Schindler-Rainman
Ron Lippitt
Jack Cole

UNIT 1 WHAT THIS IS ALL ABOUT – AND WHY – AND FOR WHOM

Most of the **learning** and **planning** and **doing** of this world happens in groups conducting their activities through meetings. This includes all types of meetings such as seminars, workshops, conferences etc.

And most of the leaders responsible for helping these groups "do their thing" feel frustrated some of the time or much of the time by the lack of involvement, productivity, excitement, satisfaction, and responsibility-taking by the members of their groups. As chairpersons, teachers, leaders, consultants, officers, they wish the members of their groups would become more "turned on" as learners and more responsible as program participants or planners or action-takers.

Let's pause a few moments to remind ourselves why it is so often difficult for most of us to become actively involved participants in many of the groups to which we are related.

1. We have been taught, in our growing up groups – the family, the classroom, the Sunday school, etc. – to expect and to wait for initiative and direction from the grownups. They define what is expected, what is okay to do, what would be "graded" as good behavior or good work. It has been safer or polite to wait for somebody else to go first.
2. Many of us have found that the safest way to express our negative feelings about these authority figures is to be non-participative, silent, inactive, withdrawn, and to become bored.
3. We have often subscribed to, or made assumptions about, the way the others in our group feel about active participation and cooperation with the teachers and leaders. We assume there would be raised eyebrows or even more active negative feedback if we showed responsiveness, "eager beaver" activity and active involvement in "what they want us to do". Therefore, we inhibit our inclinations to talk back and to test the ideas of the grownups. To do so we assume is dangerous to being accepted by other members.
4. Very few of us have had the exciting experience of belonging to groups that developed and "owned" their own goals, plans and choices of action alternatives.
5. Few of us know alternative ways to design meetings, other than the ones we have seen or been in, even if we'd like to improve them.

So it is really not surprising – although it is still very frustrating – when our groups show less initiative and activity than we hoped for.

This may also help to explain some of the priorities for the planning of programs and meetings and training sessions which we are emphasizing in this resource book.

Throughout you will find us making such **assumptions** as –

1. Those who are "planned for" as the members or participants in meetings need to have an important part in influencing or participating in the planning, evaluating, and replanning of their own group situation.
2. The members of any group are very different from each other in some aspects of their needs, interests, abilities, and commitments of time and energy to the particular group.
3. Groups differ from one another even if the size, composition and purposes are quite similar.
4. The designs of meetings should invite and provide opportunity for everyone to actively participate, rather than permitting periods of enforced passivity,

such as listening to lectures or long reports, or minutes of last meetings, or films.

5. Getting feedback from the member-participants, and utilizing these data for the improvement of the meetings, is one of the most important functions of a good leader or teacher or officer.

So as you scan through these resources and become familiar with where you find what kind of help, you'll see that we have been thinking about the materials and tools and ideas that will help you with all kinds and sizes of meetings in all types of organizations, working with all types of members. You may have a variety of purposes, such as:

- You may want to stimulate more excitement and learning in classes or training sessions.
- You may want to plan interesting, turned-on program activites for the meetings of your group.
- You may want to design goal-setting and planning sessions for your staff that really get them involved and committed.
- You may want to develop a better plan for your annual membership meeting, or work conference.
- Or you may want to take the great step of revolutionizing staff meetings and committee meetings to make them more productive and more exciting than they are now.

SOME QUESTIONS WE HAVE BEEN HEARING FROM YOU

To prepare ourselves to be helpful to you we made a list of all the questions we could remember that various ones of you have asked up over the years as we have had the challenge and fun of helping you, in many communities and types of organizations, to plan and conduct more productive, satisfying, and creative meetings. "You" are corporation presidents, agency executives, volunteer committee chairpersons, managers, program leaders, training directors, consultants, youth group leaders, etc. Here are some of the questions we have heard most frequently from you:

- "What do you have to do ahead of time to guarantee a good meeting?"
- "How do you get the members to come to the meeting?"
- "What can you do about people who dominate a meeting?"
- "How can you get them to carry through on commitments after the meeting is over?"
- "How can you have any real participation when you have to give them lots of information?"
- "You can't get everyone to participate in big meetings, can you, like 50 to 100, or 500 or 1000?"
- "How can you keep from starting late?"
- "If you use equipment, how can you prevent snafus?"
- "How can you prevent all the front seats being empty?"
- "What if the planning committee is too scattered or busy to get together?"
- "Is a one-day session of our committee long enough to plan a program for a year?"
- "How can you evaluate a meeting?"
- "Is it best to have one leader or to rotate leadership?"
- "Do you pay resource people or expect them to be volunteers?"
- "How long should a meeting be?"

– "What if some people just won't speak up?"
– "What if you have a very long agenda?"

This is a sample of the many important questions we have tried to respond to and to help you make decisions about in this resource book on the planning and conducting of **program, meetings, conferences, classes, workshops, seminars, conventions, etc.**

OVERVIEWING THIS RESOURCE BOOK

Where will you find the answers to your various questions?

In Unit 2 you will find an **analysis of some of the ways in which all kinds of meetings have similarities** that can be considered when you do planning, and the many ways in which various kinds of **meetings are different** from each other.

In Unit 3 you will find **actual guidelines for designing any type of meeting,** and some **planning sheets** which have been tested out in the planning of meetings for many types of groups in many situation.

Unit 4 provides you with a **basic inventory of the things that planners need to think about before meetings, during meetings,** and **after meetings** in order to assure the most effective use of the time and energy of the group members.

In Unit 5 you will find some **program planning resources** which are available for those who want to plan successful meetings.

In Unit 6 we look at a **variety of the traps** which many meetings planners fall into, but which can be avoided by really "aware" meeting planners.

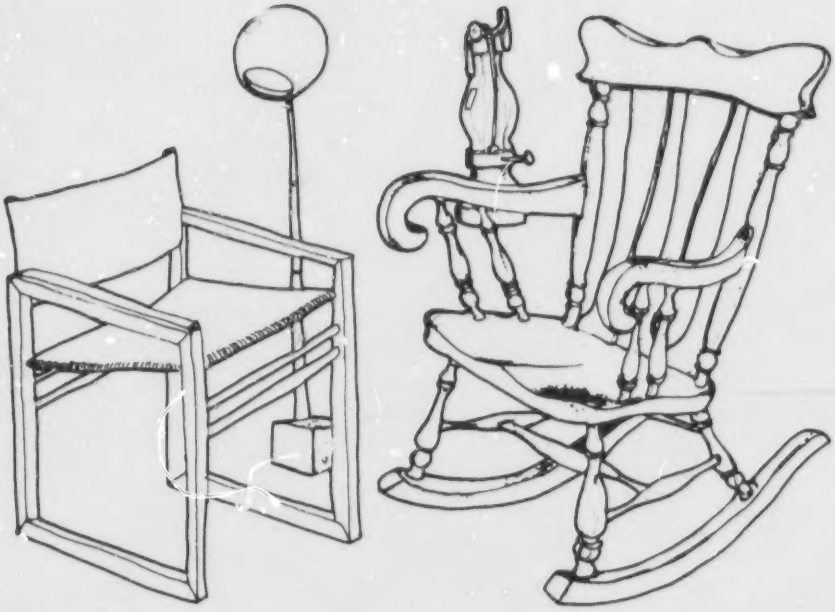
Then in Unit 7 you'll find a sample of some **things that come up in meetings and ideas on what to do.** The situations have come from the statements of dilemmas which many of you have described in your planning and leading of meetings.

And in **Unit 8** is a **toolkit** which will assist you in the planning and leading of meetings. There you'll find ways to start your meetings, sample designs of some meetings, ways to share ideas, goal setting and planning, tools for helping groups look at their own problems of efficiency, tools for getting feedback from participants, getting evaluations on meetings, and a section on role playing.

Unit 9 describes ways in which we have used this book and some ideas for you.

Then there is Unit 10 with a selected annotated bibliography where you find additional resources.

So we hope you will find this a useful book that will help you improve the meetings you lead and/or in which you participate.



UNIT 2 SOME THINGS ALL MEETINGS HAVE – SIMILARITIES AND DIFFERENCES

Like people, meetings, **all meetings**, have some characteristics in common, as well as some important differences. Some meetings are a one-time thing; others are part of a continuity that happens regularly. Some last an hour, others a day or several days. Whatever the shape, size, and dimensions of your meetings, here are some common characteristics to think about. These will affect your decision-making as you plan your meetings, and lead them, or help others lead them.

1. **People** – all meetings have people involved. There may be as few as three or as many as several hundreds or thousands, depending on what the meeting is all about. Some of the people will be experienced in the deliberations of the meeting, others may be new. Some may be young, others middle or older. There may be both men and women from different economic, social, religious, racial and ethnic backgrounds. They may come with similar, or widely different value orientations. Some will be highly motivated, and some will be coming as a matter of duty. Their degree of involvement before and during the meeting will differ greatly. It is important to take a look at the composition of the group, and the differences among participants will need to be taken into consideration when planning a meeting.

2. **Purpose** – All meetings have reasons for people coming together. Sometimes these purposes, or hoped for outcomes, are clearly stated, and sometimes they are taken totally for granted. At any rate there will be a variety of kinds of desired outcomes, such as: that people will experience something, learn something new (either new information or skills), make decisions, do action planning, provide inspiration, change attitudes or behaviors, and stimulate involvement and commitment. Any of these purposes, or any combination of them, will affect your meeting planning.

3. **Atmosphere, Climate** – all meetings have an atmosphere or climate. Sometimes it just happens, more often it is planned to ensure providing the kind of atmosphere that will facilitate a productive meeting. The atmosphere is affected by the physical surroundings, the arrangements, the temperature of the room, the patterns of greeting, seating and meeting people, and the patterns of involvement or non-involvement during the meeting. If some thought is given to it, all meetings can have an atmosphere that is conducive to participation and productivity.

4. **Place and Space** – meetings are held in a space and place, and as one thinks about a place and space it is important to consider the following characteristics: the access to the space, its size, the kinds of movable furniture available, the acoustics, the cost, whether or not there are adequate parking facilities, how this space relates to the purpose of the meeting, equipment needed, lighting, temperature controls, restroom facilities. Another important thing to think about is how people feel about the place and the space that is being considered. For instance, sometimes meetings are held in parts of towns that are not easily accessible to everyone, or they may be held in buildings that may have some kind of restrictive membership regulations or negative meanings. Certainly the space and place has much to do with the way people feel as they enter the meeting, and with the degree to which they can comfortably and productively do their business.

5. **Costs** – all meetings have some kind of cost attached to them. Some of these are carried in a regular ongoing budget; such as program or board budget. Others have costs because room rental or other items are necessary, or it may be the rental of equipment. At any rate, it is well to know what a meeting costs, and to include this when one thinks about, for example, staff and secretarial time, as well as some of the items mentioned in the check sheet (Unit 4 p. 27-34)

6. **Time Dimensions** – all meetings have beginnings and endings, although the actual length of time may vary greatly. Also within that time there is some kind of planned sequence of events, or agenda items. It is important to think through who makes the time decisions, as well as when a meeting should be held, including some thought as to how long it takes for most people to travel to the meeting, and from the meeting.

7. **Work Before Meeting** – some meetings are carefully planned beforehand, others just happen. It is important to think about and plan for the people who are coming, ways to get them there, ways to make the meeting interesting, materials that might be needed, and other preplanning considerations mentioned in later sections. It is clear that the productivity of the actual meeting has much to do with the work that goes on in planning the meeting beforehand.

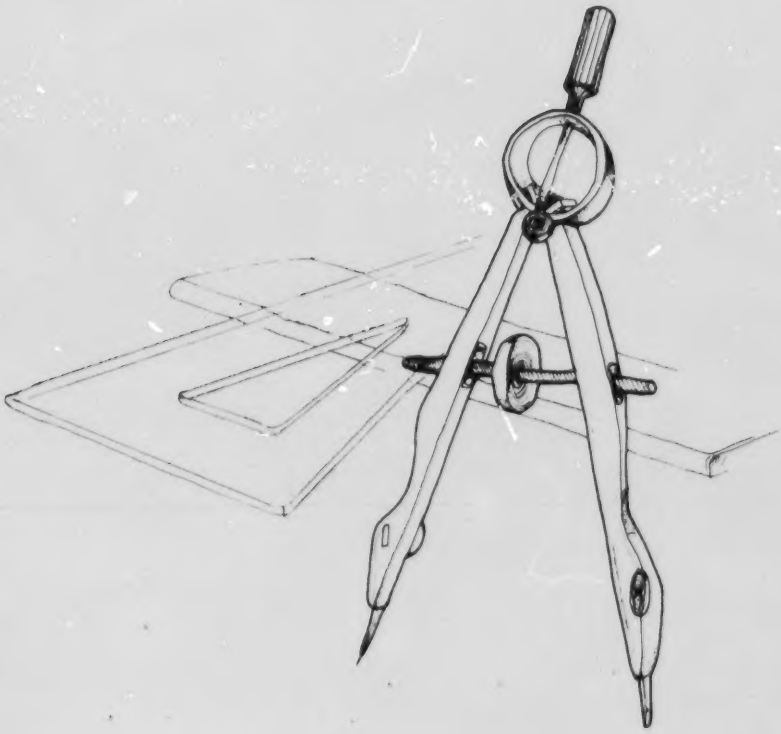
8. **Plans, Program, Agenda** – all meetings have some kind of a meeting plan, though again some of these plans are thought out beforehand and some are not made till the meeting actually starts. This should be a common element of all meetings, an explicit planned program or agenda, which can be shared by all participants. Things to be thought about here are: who makes this plan, to what degree are participants involved in making the plan, what kind of items can be dealt with, and how many in the time that is available.

9. **Beginnings, Middles and Endings** – all meetings, whether they are one hour or several days in duration, can be looked at in terms of beginning, middle and ending. Again, often there is little thought given on how to begin, or how to end a meeting, most of the focus being on the actual content, or the middle of the meeting, the work to be done. It is important to give thought to the beginning and ending, or the middle is likely to be unproductive or to have little follow-through.

10. **Follow-Up** – it is rare that meetings end without some need for follow-up activities, including thank you notes, implementing action items, paying bills, catching people up who were not there, phone calls, minutes, etc. Part of planning any meeting ought to be thought given to the follow-up after the meeting, so that the meeting was worth having.

These are 10 dimensions which all meetings have in common, although every meeting differs from every other one on each of these dimensions. In the sections which follow we will be showing ideas and techniques to help you make the plan for each of your meetings appropriately different in relation to these dimensions of meetings.

UNIT 3 DESIGNING PARTICIPATORY MEETINGS



UNIT 3 DESIGNING PARTICIPATORY MEETINGS

You might be feeling at this point that this business of designing or planning meetings is a bit burdensome, with all the things there are to think about. Actually, this resource book should make the job of planning and leading a lot simpler and help prevent a wide variety of time wasting traps and errors in the leadership and planning of meetings.

Now let's turn to the actual planning of the design and flow of a session or sessions. We are providing three guidesheet tools, with suggestions about the process of planning, during which the meeting checklists will be useful. (See pages 27-34).

SEVERAL BELIEFS ABOUT PLANNING

1. Our first belief is that anyone with leadership or teaching responsibility for any type of meeting has the job of planning carefully for that event rather than "playing it by ear." Time is precious and groups need a renewal of faith that a productive experience and outcome is possible, and that an orderly, thoughtful process of involvement and collaboration can result from a good planning job.

2. Our second belief is that the anticipated participant-members of the meeting or conference or workshop or class must be represented in whatever way is feasible in defining the desired outcomes of the meeting. This may be by questionnaire, or meeting with the program committee, or telephone interviews with a sample, or any other way of eliciting needs, interests, priorities, and expectations ahead of time from participants. If none of this can be done beforehand, a census of needs and expectations can be taken at the beginning of the meeting itself.

3. Our third belief is that the plan for the meeting must provide the kinds of opportunities for every person to participate which will motivate their involvement and elicit and utilize their personal resources, skills and ideas.

4. And, fourth, the design must make provision for getting feedback from the participants about their feelings of satisfaction, productivity or frustrations, and ideas for improvement, so that the process can be revised during the meeting and participants can experience their influence in guiding the process.

5. Follow up must be part of the planning process, including who will do what and when it will be done.

Using these beliefs as a foundation, we have developed three specific planning tools and some steps for using them .

THE THREE STEPS OF PLANNING FOR A MEETING

Assuming that a decision has been made that there is reason for a meeting the first step to think of is **Pre-Design Preparation**. Before we can think about questions of timing and the flow of the meeting or course or conference, we must mobilize the best thinking we can about three questions. The outline for doing this is presented in Planning Sheet I, (see page 23). As you see, the three questions are:

1. What can we summarize as information about the needs, interests, expectations of the participants and the individual differences among them?

2. What are possible purposes/outcomes of the meeting that would actualize the needs and expectations of the participants and the planners?

3. What are possible activities, materials, human resources, and agenda items that would facilitate the achieving of the priority outcomes?

In our work with planning groups we have found it particularly helpful to brainstorm on questions 2 and 3 to get out all the ideas for focusing on the questions of outcomes and ingredients and then to assign priorities. This brainstorming can be done by the planning group and/or by the planners and a few participants, or if need be at the first meeting of the group.

The second planning step is the actual design for the meeting or sequence of sessions. **Planning Sheet 2** (page 24) provides a format to help you with this. You will note that at the top, this page helps to summarize, from the decisions of the first planning sheet, the desired goals or outcomes which you have settled on. The rest of the page is for the plan of the startup period from the time the first participant walks through the door, and for estimating the timing and flow of the meeting, with the divisions of responsibility for leadership, the groupings, needed materials, resources, and space arrangements in the room.

The third step, **Planning Sheet No.3,** (page 25) facilitiates the planning of how you want the meeting to end – announcements, commitments, followup phases, etc. and what followup activities are part of the design to insure the outcome and continuities you have as priorities. This after-the-meeting part of the design is a critical determiner of whether the time and energy of the meeting is worthwhile.

With this design for planning in mind, and the suggested planning sheets reviewed, you may want to turn to the illustrative designs of several meetings, in the toolkit, on pages 53-91.

We would like to be able to provide each of you with the particular individulized help you need in planning your meetings, but since we can't do that we have included these sample designs as illustrations of the ways we use the three planning sheets. We recommend that you try them out.

PLANNING SHEET NO. 1

DIAGNOSTIC PLANNING FOR DESIGNING PARTICIPATORY MEETINGS

Thinking about the participants or members (e.g., how many, subgroups and individual differences, needs, readinesses, interests, expectations)	Some desirable outcomes of the meeting (e.g., skills, information, values, concepts, actions, plans, recommendations, decisions)	Ideas for activities, experiences, resources to facilitate the outcomes, (e.g., exercises, projects, resources, facilities, work groups)
*Star most important characteristics, and differences among participants to keep in mind in designing	*Star highest priority outcomes	*Star what seem to be most appropriate, effective, feasible ingredients of design

PLANNING SHEET NO. 2

THE MEETING DESIGN: TIMING, FLOW, ASSIGNMENTS, ARRANGEMENTS

Desired Outcomes or Goals:

Time Estimate	Activities, Methods, Groupings	Who responsible	Arrangements of space, equipment, materials
1. Pre-Meeting and Start-up of the Meeting			
2. Flow of Session after Start-up Activities			
	(Continue on additional sheets as needed)		

PLANNING SHEET NO. 3
COMMITMENTS, FOLLOW-UPS, SUPPORTS

1. Plans for ending the Meeting (e.g., closing activities, evaluation, reports of back home plans, deadline commitments, etc.)

2. Followup Actions Who? Will do what? When? Where?
(e.g., often a directory of names, addresses, telephone numbers of participants very important at this point, and getting any followup dates recorded in everyone's calendar)

3. Cleanup and Other Immediate Commitments
(e.g., what has to be returned, thank-you calls made, bills paid, etc.)

UNIT 4 A CHECKLIST FOR PLANNING MEETINGS

Unit 4: A CHECKLIST FOR PLANNING MEETINGS

It is so easy to forget some crucial items in the planning of meetings – some materials you wanted to be sure to have available, the telephone call to the custodian, the name tags, extra minutes of the last meeting, and many others. We have found it indispensable, and very embarrassment-preventing to have a checklist to review and check off as part of the process of planning and leading meetings. The one on the following pages should be a good starter; one to add to because all meetings, of course, are different – all items are not relevant for every meeting. But in our experience the main headings and most of the items are quite universal.

The checklist is organized under:

1. Publicity – Promotion – Notifying
2. Agenda and Resource Materials
3. Responsibilities at the Meeting
4. Space Check-out
5. Equipment for the Meeting
6. Materials for the Meeting
7. Budget
8. Just before the meeting
9. At the meeting
10. After the meeting

This checklist complements our three planning sheets, and the Toolkit (pg. 55).

CHECKLIST

1. PUBLICITY/PROMOTION/NOTIFYING	Who responsible	By when
_____ notices – to whom	_____	_____
_____ letters of invitation	_____	_____
_____ direction to meeting place	_____	_____
_____ phone calls	_____	_____
_____ news releases	_____	_____
_____ contact with the media	_____	_____
_____ copies of speeches	_____	_____
_____ copies of meeting plan	_____	_____
_____ pictures/photographs	_____	_____
_____ bulletin boards	_____	_____
_____ personal contacts	_____	_____
_____ other	_____	_____
2. AGENDA AND RESOURCE MATERIALS		
_____ copies of agenda	_____	_____
_____ contact people on the agenda	_____	_____
_____ materials needed (e.g., reprints)	_____	_____
_____ previous minutes	_____	_____
_____ committee reports	_____	_____
_____ previous agreement and time commitments	_____	_____
_____ others	_____	_____
3. RESPONSIBILITIES BEFORE THE MEETING		
_____ leadership assignments	_____	_____

_____	documentation or recording assignments	_____	_____
_____	resource persons?	_____	_____
_____	observers?	_____	_____
_____	"hosting" roles	_____	_____
_____	making reports	_____	_____
_____	trying out equipment	_____	_____
_____	test whether charts, posters are readable	_____	_____
_____	test electrical outlets	_____	_____
_____	preview films for timing & content	_____	_____

4. SPACE CHECK OUT

_____	size and shape of space	_____	access to meeting room (s)
_____	electrical outlets	_____	lighting
_____	mike outlets	_____	name of custodian/engineering, where to be reached
_____	acoustics		
_____	doors		
_____	bathrooms (where, no. can accommodate)	_____	telephone access for messages and calling out
_____	stairs		
_____	elevators	_____	exhibit space
_____	heat/cold regulation	_____	wall space for newsprints, etc.
_____	ventilation		
_____	parking facilities: number & access	_____	emotional impact (color, aesthetics)
_____	registration area	_____	others
_____	location	_____	
_____	transportation, access to facility	_____	
_____	room set up arrangements	_____	

5. EQUIPMENT FOR MEETING

_____	tables (number, size, shape)	_____	film projector
_____	chairs (comfort, number)	_____	chalkboard - chalk
_____	microphones	_____	typewriters
_____	audio tape recorder	_____	waste baskets
_____	audio tape cassettes	_____	bulletin boards
_____	video tape recorder	_____	pillows
_____	video tape cassettes	_____	chalkboard eraser
_____	extension cords	_____	projection table (s)
_____	overhead projector	_____	flannel board
_____	newsprint easel (chart stand)	_____	easel

_____ slide projector
_____ screen
_____ platform
_____ record player
_____ records
_____ gavel
_____ coffee, tea dispensers
_____ water pitchers
_____ cups
_____ camera
_____ film
_____ transparencies & appropriate pens & grease pencils
_____ extension cords
_____ ditto machine or other duplication equipment
_____ others

6. MATERIALS AND SUPPLIES FOR THE MEETING

_____ name tags/tents
_____ small tip felt pens
_____ large tip felt pens
_____ masking tape
_____ paper clips
_____ crayons
_____ pins
_____ scissors
_____ stapler
_____ glue
_____ newsprint paper
_____ scratch paper
_____ pencils
_____ dittopaper and ditto masters
_____ fluid for ditto masters
_____ self carbon paper
_____ reprints of articles
_____ copies of previous minutes
_____ copies of reports
_____ books
_____ visual aids
_____ puppets
_____ colored paper
_____ pamphlets
_____ display materials
_____ flowers or flower arrangements
_____ decorations
_____ posters
_____ instruction sheets
_____ resume of resource people
_____ directional signs (to meeting)
_____ chalk (various colors)
_____ file folders
_____ others

7. BUDGET*

Costs	Estimated Cost
_____ mailing and stamps	_____
_____ telephone calls	_____
_____ telephone conferences	_____
_____ rental of equipment	_____
_____ rental of space	_____
_____ paper materials	_____
_____ name tags	_____
_____ newsprint	_____
_____ paper	_____
_____ construction paper	_____
_____ writing materials	_____
_____ pens	_____
_____ crayons	_____
_____ special pens for overhead	_____
_____ grease pencils	_____
_____ secretarial time	_____
_____ transportation	_____
_____ meals	_____
_____ bar	_____
_____ coffee, tea, juice	_____
_____ reproduction of materials	_____
_____ folders	_____
_____ tapes	_____
_____ operator of projection equipment	_____
_____ operator of P.A. equipment	_____
_____ speaker fees	_____
_____ consultant fees	_____
_____ entertainment	_____
_____ flowers	_____
_____ film reproduction	_____
_____ tape reproduction	_____
_____ others	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

*) some of these will not be budget cost items for some planners.

Income		Estimated Income
_____	registration fees	_____
_____	sale of materials	_____
_____	grants	_____
_____	sale of meal tickets	_____
_____	donations	_____
_____	membership fees	_____
_____	coffee and tea charges	_____
_____	others	_____
_____		_____
_____		_____
_____		_____
_____		_____
_____		_____

8. JUST BEFORE THE MEETING		Who Responsible
_____	seating arrangements – general session and subgroupings	_____
_____	extra chairs	_____
_____	extra tables	_____
_____	P.A. system checkout	_____
_____	equipment (easels, screens, etc.)	_____
_____	materials (paper, pens, etc.)	_____
_____	ash trays	_____
_____	water, glasses	_____
_____	thermostat	_____
_____	opening and closing of windows	_____
_____	refreshment set-up	_____
_____	registration set-up	_____
_____	check that charts, boards, screens can be seen from everywhere	_____
_____	agendas available	_____
_____	other materials available for handouts	_____
_____	name tags/tents	_____
_____	table numbers	_____
_____	coffee, tea, etc.	_____
_____	evaluation forms ready	_____
_____	reproduction equipment (e.g., ditto machine)	_____
_____	audio-visual equipment ready	_____
_____	others	_____
_____		_____
_____		_____
_____		_____
_____		_____

9. AT THE MEETING — Who Responsible

- _____ meeting, greeting, seating of participants and guests — _____
- _____ documentation – recording — _____
- _____ greeting of late comers — _____
- _____ evaluation activity — _____
- _____ handing out materials — _____
- _____ operation of equipment — _____
- _____ process review, stop sessions, etc. — _____
- _____ announcements — _____
- _____ others — _____
- _____ — _____
- _____ — _____

10. END OF MEETING – AND AFTER

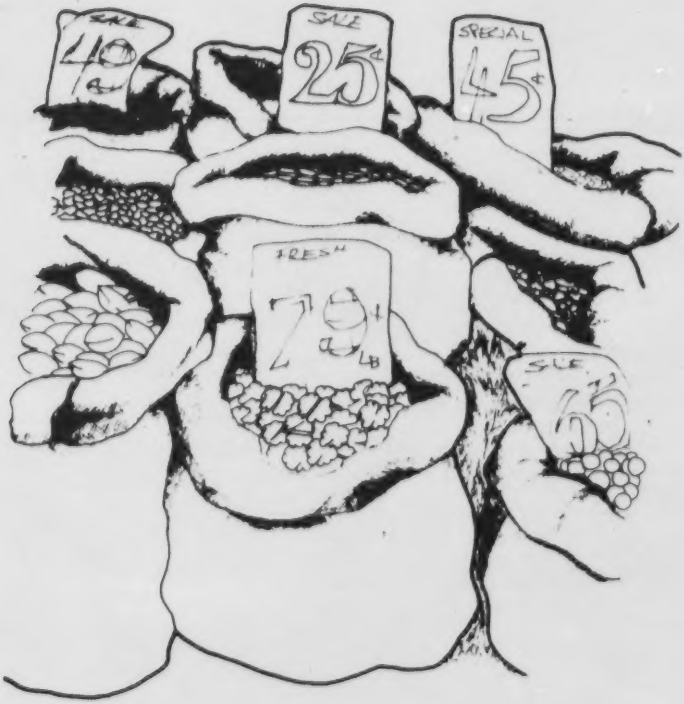
- _____ collect unused materials — _____
- _____ return equipment — _____
- _____ clean up — _____
- _____ thank helpers — _____
- _____ read and analyze evaluation/feedback — _____
- _____ prepare feedback on feedback — _____
- _____ mail follow-up materials — _____
- _____ remind people of their follow-up commitments – phone _____ write _____ — _____
- _____ lay plans for next meeting; dates if there is to be one — _____
- _____ pay bills — _____
- _____ collect outstanding moneys — _____
- _____ others — _____
- _____ — _____
- _____ — _____
- _____ — _____

A few ideas about the use of this checklist

For your particular kinds of meetings you may want to create an abbreviated checklist. We suggest you reproduce whatever form is appropriate for you, making enough copies so that you and your co-workers can use one for each planning activity.

Then you will also have it available to hand to volunteers and other associates to whom you care to give help and support in their planning and leading of meetings.

In the next unit there is another kind of checklist of program resources you may find helpful to scan as you plan the content of your meetings.


SALE
40¢
SALE
25¢
SPECIAL
45¢
FRESH
SALE
75¢

UNIT 5 RESOURCES FOR PROGRAM PLANNING

In addition to the ingredients needed for a successful meeting, there are all kinds of resources that will enrich your program planning and implementation. Here we are describing some human and experience resources, written resources and some of the possible purposes for including them, or special ways to tap them to enrich the program of the meeting.

Also there are some tips and traps about utilizing people, experiences and the written word.

RESOURCES CHECKLIST

The Resources People	Purposes
1. Participants-Members	to help plan as sub group leaders to give ideas to make decisions
2. Speakers	to bring information as triggers for disucussion to answer questions
3. "Expert Consultants"	to teach special skills to lead participative meetings to moderate a meeting or panel
4. Leader (s)	to convene to facilitate activities to utilize other people
5. Secretary	to document what goes on to teach others how to record
6. Librarian	to organize revelant materials to check materials in and out to develop a display of written materials
7. Custodian	help with room set up to gather necessary equipment

SOME TIPS & TRAPS IN UTILIZING HUMAN RESOURCES

Tips

1. Let people know before the meeting if you are going to ask them to do something (e.g. record, lead a sub group etc.)
   - agree on the task
   - agree on the time & timing
   - orient them to meeting participants and to the program
2. For member participation give clear instructions - preferably written and verbal
3. Meet with outside speakers and consultants ahead of time, if possible–
   - If not, have a telephone conference with them
   - Or/and write a memo describing your request of them and ask for an answer in writing.

4. Ask your helpers (e.g. secretary, custodian, librarian) several days ahead rather than at the last minute.

Traps

1. No set time limits:
   - for speakers
   - for agenda items
   - for participation by group members
2. No clear contract with persons as to what is expected of them and what they expect of you.
3. No clear communication of the purpose of the meeting.
4. No recognition of the participation and contributions of others.
5. Assuming they'll know "what's needed" and "what's expected" without a personal briefing session.

Resources

Direct Experiences	Purposes
1. Role Playing	to practice new skills (e.g. handing hostility-or making a speech) to learn how to empathize to do anticipatory practice (e.g. telling your boss you want a raise before you actually do it)
2. Simulations	to learn through trying out and participating in an (artificial) situation that is patterned after real life situations -- e.g. power struggles, inter-agency collaboration, Voter Education
3. Field Trips	• to observe experience and see relevant sites, experiences, exhibits etc. (e.g. how an alternate school really functions - how different people live & worship.)
4. Small group decision making, problem solving	• to learn the pros and cons before making a de-sion • to get a feeling for the complexity of problems to be solved • to help people "own" the decisions they are making and which affect them.
5. Video Taping	• to practice a skill (e.g. how to interview and learn to analyze your own verbal and non-verbal behavior) • to document proceedings of a group • to give feed back to a small group
6. Audio Taping	• to record a speech • to record a part of a meeting for purpose of analysis • to record a short critical confrontation situation for purposes of playing it to a group for discussion and developing alternative solutions

TIPS AND TRAPS ABOUT PROVIDING DIRECT EXPERIENCES

Tips

1. Learning through experiencing is one of the best ways to acquire new or additional skills, ideas, understandings.
2. When helping people learn new skills give them opportunities to practice and repractice until they feel they have acquired the skill they are practicing.
3. Be sure the role playing situations (see toolkit page 55) and simulations are as near to real life as is possible.
4. The anticipation planning session ahead of time and the review of learnings afterward are critical phases of a field trip.
5. In any audio or video recording test and re-test whether equipment is working, sound is loud enough, recording conditions of room are O.K., etc.

Traps

1. No observation plans for field trips
2. Untested video equipment
3. Too little equipment for the number of participants
4. No time for de-briefing after role playing and/or simulations
5. Lack of "division of responsibility" - plans for the activity
6. Making the recordings too long so playbacks are boring and too time consuming.

The Resources "The Written Word"	**Purposes**
1. Displays of pamphlets & books	• to acquaint participants with additional resources • to check out and read (at least in part) as part of the meeting design • to read & critique
2. Articles – published and unpublished	• for critiques • to provide up to date information as background reading
3. Multi-media resources (e.g. a book with audio taping)	• for group discussion • for information • for problem solving
4. Instructions	• so groups can start without verbal instructions • to clarify verbal instructions
5. Background papers	• to give information needed • to make meetings useful • as discussion trigger
6. Poetry & other readings, quotes	• to set atmosphere • to illustrate a point • to summarize

TIPS AND TRAPS IN RELATION TO THE USE OF WRITTEN MATERIALS

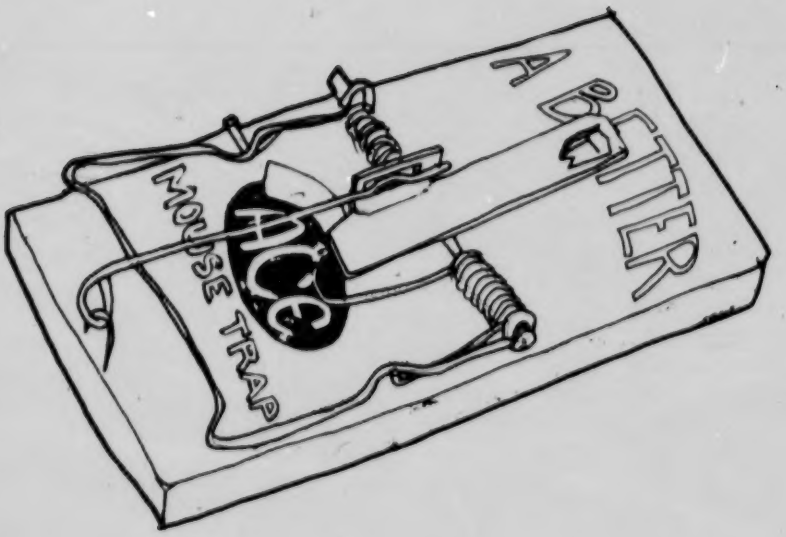
Tips

1. If you want materials read be sure to give time during all meetings for it.
2. Have enough copies of written materials avalable.
3. Written instructions can be on the overhead projector or on newsprint sheets around the room or individual copies on the tables.
4. Test instructions ahead of time to see if they are clear to participants of the meeting.
5. If using multi (e.g. audio tapes) check beforehand to make sure they work and set for the place you wish to use.
6. Displays and exhibits are most useful if there are persons with them who explain what is there and answers questions.

Traps

1. To send materials ahead of time and assume everyone will read them.
2. Material that is too lengthly.
3. Quoting without adequate identification of the source.
4. Articles and/or books filled with technical jargon .
5. Articles, chapters, or parts of books that are too long for easy reading.
6. Making no use in the meeting of reading that has been done.

This is a reminder checklist to scan and add to as you use it in your own planning activities, or help others to do their planning of meetings. The toolkit provides you with additional suggestions about the procedures for using these resources.


A BETTER
MOUSE TRAP
ACE

UNIT 6 SOME TRAPS IN PLANNING AND CONDUCTING MEETINGS

One of the greatest resources for all of us is the ability to learn **from** our achievements. Another good resource is the opportunity to learn from our mistakes, and from the learnings of others who have "tried that before" and have been innovative in finding ways to avoid traps and improve upon their successes.

The planning and conducting of thousands of meetings has preceded the ones you are planning this year. To avoid even a few of the mistakes and to learn from some of the many creative inventions will greatly increase your skills and successes.

In this chapter is some of the knowledge we have pooled from our own mistakes and discoveries along with that of many others from whom we have learned.

Here are a few of the most critical traps to the planning and leading of successful meetings. No doubt you can add to these right now from your experience, and hopefully will be able to identify, analyze, and share additional traps during the next year – and share them with us and other collegues.

Let's list traps during the planning of a meeting, and during the conducting of a meeting.

Traps During Planning and Preparation

#1 Meeting planners often **plan with no data** about the participants, their hopes and expectations about the purpose of the meeting. Often meetings are planned in a vacuum with no idea about who is coming, why they are coming, or really what specifically ought to be accomplished at the meeting. It is critical to go through the kind of cycle that has been suggested earlier (see pages 29-34) and, if one does not have the needed information, discover ways of getting it.

#2 **Lack of involvement** in the planning by those who will be at the meeting. When potential participants are not involved in some way they'll probably not take an active part, or they may not even come. They feel they have been planned for, so their attitude is: let the planners do it! We have no "ownership" of this meeting!

#3 Beautiful, but **illegible, visual aids.** So often visual aids are produced that are visually very pleasing but have not been tried out in large rooms or have not been tested for the distance from which they can be seen. Be sure to check all your visual aids beforehand, and all pieces of equipment, in the room where they are to be used.

#4 **Same meeting, same place and plan, same time.** Though sameness gives security to some, it bores others. Why not vary the meeting, place and time to suit different people of the group? Or ask group members what, where, when they'd like to meet next

time. If the meeting extends for a whole day or longer, and participants keep going back to the same seats, suggest they change.

#5 Holding meetings only because they are scheduled to be held. If there is **no real reason or agenda for a meeting,** why hold it? Yes, even if it is a planned monthly meeting. Can you imagine how motivated members would feel for the next meeting if they could count on its being really meaty and full of content, knowing that if there would be nothing to discuss you'd cancel it?

#6 **Equipment that does not work.** Check your equipment beforehand, but even when equipment checks out it sometimes breaks down at the time you most need it. So have an alternative plan up your sleeve, just in case.

#7 **Lack of plans** if extra people turn up. Often meetings that are projected for 50 people have 75 to 100 people come. It is important to have some contingency plans. In case that happens, i.e., is there a way to move or walk to a larger room? Are there extra tables available? And/or extra chairs: Or, if the opposite happens, fewer people than were planned for: can the room be made cozy and useful in some way, rather than have people feel as though they are rattling around in a large empty room.

#8 **The unbriefed resource person or speaker,** who comes in and has no idea about what you really wanted and what the group is like, and gives the usual canned speech that is always given on that particular topic by that particular person. It is extremely important to brief people beforehand whom you want as resource persons for your meeting. These briefings can be done over the telephone, by letter or in person, depending on the situation. Sometimes the resource person will send an outline of what she/he will cover.

#9 **No agenda,** or the one that omits among the items a review of the purposes for this particular meeting. For some meetings no agenda exists or if it does it is only in the head and maybe the hand of the leader. Also it is important to review and communicate the purpose(s) of each meeting.

#10 **Too many items/activities planned for the time available.** This is a trap that many meetings fall into, and a realistic plan is needed in relation to how much time various items or activities will take. If you have more items that the time allows then cut

out some items, or else arrange to put them in as pieces you can work on in small groups after the meeting or substitute these for items of lower priorities.

Traps During the Meeting

•11 **No sharing of agenda.** There is only one copy of the agenda available, and the chairperson has that. It is hard for participants/members to feel involved when they cannot see and hear the plans of the meeting.

•12 **Formal, classroom style seating,** that is rows of chairs all facing the front. This gives the participants the non-verbal clue that all action and wisdom comes from the front of the room. It makes it hard to participate actively. The only reason to have this kind of room setup is when the seats are fastened to the floor. Then participants must be helped to participate in special ways, such as two turning around to the two behind them to talk, or a stand-up break of trios or quintets to discuss a particular question. So longs as there are movable chairs they can be in a circle or small semi-circle or around tables, or other ways that invite and facilitate communication.

•13 **Meeting starts with nothing to do for early arrivers.** If you know that your meeting will have a "raggedy start," plan something for the ahead timers to do, discuss, or think about. It may be a question you want them to discuss, or it may be the use of the paired interview, or it may be some other way to get together in a table group. There needs to be some programmed way to utilize the pre starting time constructively.

•14 **Long introductions** of speakers, consultants, helpers, etc. This usually produces psychological distance between them and the participants. If you need an extensive introduction/background material on a person in order to acquaint them with that person, have those materials dittoed or mimeographed for everyone beforehand. Or give them out at the beginning of the meeting. Then you can give a short, warm, relevant welcome instead of a long introduction. Often the speakers have ideas how they would like to be introduced.

•15 **Long, drawn out speakers,** reporters, panels, etc. Often people go over the time limits they have been given. It is important to go over the ground rules

with them at the beginning of the meeting again, after having done so in preparing them to participate. And often it is well to reinforce this publicly by saying to all present: "the time of the following presentation is approximately 12 minutes," or: "I have discussed with our resource person the amount of time available, so don't worry if I give a warning, when the time is almost up." Or put a large watch in sight of the speaker.

•16 **Total reliance on one expert** at the meeting, rather than utilizing that person to help uncork the resources of all the participants. Sometimes it is better to have more than one resource person available, so that alternatives can be more openly and fully identified.

•17 **Too long coffee breaks** are often a waste of time and money, and also disrupt the continuity. Why not have coffee and tea available throughout the meeting and design the meeting in such a way that there will be moving around and stand-up time as part of the way the work of the meeting gets done?

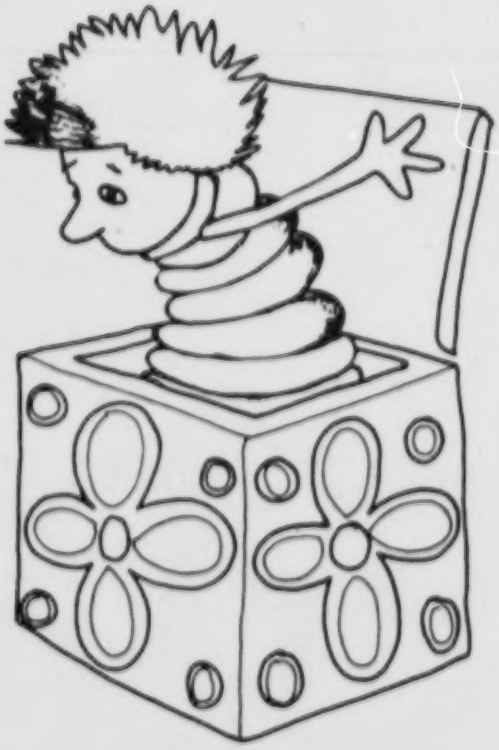
•18 **Failure to dealing with feelings of participants.** Often groups are so task-oriented, that they skip even obvious feeling issues that need to be dealt with in order to better proceed with the task. For example, if people are very hostile to one another, it is important to deal with that hostility rather than overlook it. The task will get done much better if this is done. (See Stop Sessions in Toolkit B)

•19 **No record** of what has been done or what has been said. Often, when you most want to go back to what happened at a meeting, there is no record of the proceedings. It is important that for every meeting there is some way to keep its major deliberations and work in a documented form. This can then become the history of that meeting, and of plans, decisions, commitments made.

•20 **Neglecting to carry the group "into the future"** to guarantee that the work of the meeting will pay off – such as being sure that decisions and commitments are made about **who** will do **what** and **when** to follow through.

Undoubtedly you can add some additional traps from your experiences with meetings. We hope this list will be helpful in ensuring better meetings for you, your participants and your programs.

UNIT 7 THINGS THAT COME UP IN MEETINGS. IDEAS ON WHAT TO DO



UNIT 7 SOME THINGS THAT COME UP IN MEETINGS IDEAS ON WHAT TO DO

There are some things that occur again and again during meetings. Here are some examples of typical events and episodes. We have suggested some ideas on how to handle these situations. We hope you will add your own alternative solutions. Here are eight typical confronting situations:

I. Cutting a long winded speaker
II. Coping with latecomers
III. Coping with high status person
IV. Stimulating a non-reactive, passive group
V. Coping with different time norms
VI. Dealing with long committee reports
VII. Dealing with experts
VIII. Physical set-ups

Question I -- How would you cut a **long winded speaker?**

Some Ideas:

1. One of the things one can do is confer briefly ahead of time with the suggestion to make one or two stops in the speech in order to give listeners a chance to ask questions or make comments.
2. Another one is to advise the speaker beforehand that you will give a time warning so many minutes before the end.
3. Sometimes you can stand up at a given time.
4. Or you can sit next to the speaker so you can give a "touch signal."
5. Another one is to have a timekeeper in the audience, previously agreed upon, who stands up at a agreed upon time.
6. One of the most important ways is to make very clear to the speaker ahead of time about how long a speech the group is expecting.
7. Another way is to say to the whole group something like: "'Dr. So and So' will speak approximately 20 minutes, after which you'll be able to ask questions."

Question 2. -- One of the problems is the puzzling issue of **latecomers** after things have gotten underway. What can you do?

Alternative Ideas:

1. One of the things you could do would be to have one or several people designed to take care of helping greet and up-date the late people.
2. Perhaps have a separate table near the door so people can pick up any needed material as they come in.
3. Another one if you have a number of tables, is to leave one or two spaces open, at each table and have someone ready to invite the latecomers to join already formed groups.
4. It is effective to have established a pattern of always starting on time. Then people know that if they are late, they will miss something.
5. It is important to include the latecomers as quickly as possible, even though they may feel guilty about being late.

Question 3. – The national president of the organization is going to be at the next meeting. What are some of the ways to make the group feel at ease with this person in attendance?

Alternative Ideas:

1. Have a coffee hour at the beginning of the meeting where people can meet the person informally.
2. Utilize the visitor early in the meeting so there is no necessity for anxiety or prolonged curiosity.
3. Have different seating arrangements so the national president is not always at the head table. The president might sit at different tables in the room with different people, to get to know some of them.
4. Or perhaps the president could eat beforehand and then walk around and meet people during the course of the meal.
5. Or the president could have a different course at different tables .
6. Or give the president a place on the agenda to ask questions of the group so that he/she can demonstrate an interest and a posture of inquiry toward the group itself.
7. Ask the president what he/she would like to do to get in touch with the group.

Question 4. – You've heard chairpeople say: "Gosh, what do I do with that group? You ask them a question and they just don't respond; they're apathetic; I just don't know where they are?"

Alternative Ideas:

1. One way to handle it might be to break down into buzz groups or table groups to discuss the issue at hand, and then have a rotating report back to the total group.
2. Another thing is to ask for a brainstorm in which you do away with the pressure of evaluation of discussion by having everybody stimulate each other by calling out ideas.
3. Another one might be to divide them into trios and have them come up with all the ways: "we could get our group to participate more."
4. You could have a guided discussion sheet about the topic available for each table.
5. Or, you might train some conveners for small groups so that the convener can help that group participate more actively.
6. Challenge them by asking them "what questions would you ask a group about this?"

Question 5. – One roadblock for many meetings is the issue of starting a meeting at a particular time: **Do you start at the stated time or when people arrive?**

Alternative Ideas:

1. One approach is to recognize that even in the best of groups people aren't going to walk in the door at the same time, and therefore it is best to have plans for what you might call a "ragged beginning" in which there is something to do from the moment the first member comes in; for example, suggestions for some pre-meeting conversation topics or some things to skim and read or some short interviews of each other.
2. Or you can establish the pattern of starting on time and then catching up the latecomers later.

3. Another one is to have some small group tasks done as people come in to the meeting. The total group portion of the meeting doesn't start until the small groups are all ready to report out to the whole group.
4. Another thing that works sometimes is to get away from the assumption that the leadership has the responsibility for taking the rap of being disciplinary or calling attention to people who are late. Instead, have a committee of peers that works on an approach to late members and then calls attention of the group to its own norms. So, it's a member of the group rather than the leader who has the job of dealing with the problem.
5. Another way is to have the whole group discuss "what we might do about some people coming early and some people coming late, and how we as a group might handle it."
6. Or, you might test the starting time for this group. Is it realistic, or was it set by a small number of people for their convenience? Or, was it set many years ago and has never been challenged?

Question 6. – One of the things that we face as a kind of puzzle in most groups is **how to deal with committee reports,** including the reading of lengthy minutes of previous meetings. **How can you deal with this?**

Alternative Ideas:

1. One thing is to require a time limit, so that you may not have more than two minutes to report out, and then to cut off the report.
2. Or it could be a requirement that the committees have summary reports at each member's place so there can be a reading period, and then instead of a report out there is a responding to questions on the part of those who have just finished reading it.
3. Or, another one is to ask work groups to hand in their written report for the sake of the record, but report verbally only the three most exciting things that happened, or the two things about which they want responses from the other group members.
4. You might have someone interview the chairperson of the committee to distinctly spell out highlights: a kind of public interview.
5. Another way is to have the report in the form of a mobile design, large drawing, or even ask groups to act it out non-verbally, rather than thinking of it as only in written or spoken form.

Question 7. – Often we invite expert resource people. How do we decide who we want, and then how do we brief that person to make sure he/she is really useful?

Alternative Ideas:

1. Sometimes give or send the expert a summary of actions, problems, or situations that the group has experienced relating to the resource person's specialty.
2. Sometimes it's possible to have a brief brainstorm or listing at previous meetings around some of the things the members of the group hope to learn or get clarified or solved in the session with the resource person.
3. Or you could have a panel discussion at the beginning of the meeting among some of your members asking questions, with the resource person being there to listen and preparing to deal with them.
4. Another one is to have either a personal or telephone conference between two or

three members of the group and the resource person.

5. Ahead of time, advise the resource person that the group does have some definite ideas they want to explore, and that they are preparing those in order to save the speaker the problem of making up and preparing a speech. They want to use him/her as a resource responder rather than as a speaker.
6. Be very clear with the resource person in regard to the length of time, the topic and the hoped-for outcomes of the meeting.
7. Ask the resource person how he/she would like to handle the situation. Also ask if there are special ideas they want to share.

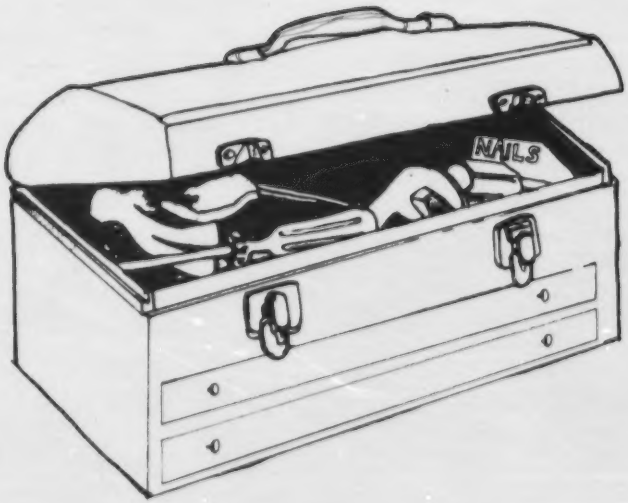
Question 8. – I've just walked in the door of the room where we're going to hold our meeting and the set-up is nothing like I asked for. What now?

Alternative Ideas:

1. Well, you have several choices; one is to get busy and rearrange it.
2. Rearranging either by yourself or getting several others to help you move the tables out of those fixed, straight line patterns or move the chairs away from the classic rows, etc.
3. Sometimes you can find out where the custodian is, and ask him to please help you rearrange it.
4. Or have this be part of the start-up as people come in and make it a fun kind of work-session with their help.
5. It is important to have clear plans for the kind of groupings that are needed for the meeting activity so that you can look at the space and say: "We're going to start our meeting with circles of five, or we want semi-circles of six that can close up and make circles later on in the program."
6. Hopefully you've been there beforehand and have done some careful planning as to how to use this space, so that you know what you're going to do now.
7. You could also scout the building to see if there is an empty room that would be easier to set up in a quicker manner.
8. Also, there is frequently a very formal kind of rostrum or platform or something in the front, and it is important to try and destroy the authority image, of "the kind of speaker from the pulpit" by changing the concept of where the front of the room is, and what is going to happen from there.

Now that you have reviewed our ideas about these critical kinds of questions, you might want to take each one and reflect on what additional ideas you have for handling them. Certainly there are many more possibilities. These are just a beginning to help get you triggered to add some of your own solutions.

This kind of rehearsal to develop your repetoire of solutions will do much to enhance your creativity when such situations occur. We recommend you try this same type of brainstorming alternatives about other critical issues of meeting leadership.


NAILS

UNIT 8 TOOL KIT TO HELP WITH YOUR MEETINGS

Tool Kit A – Illustrative Designs and Plans

1. Sample Meeting Designs and Plans
   - a one-day retreat
   - regular monthly board meeting
   - a swimming class
   - community theatre program committee
2. Sample Physical Arrangements Briefing Sheet
   - sample diagrams
3. Sample Agenda Sheet

Tool Kit B – Beginnings of Meetings

1. Greeting Sheet
2. Paired Interview
3. Name Tags
4. Sign In Sheets
5. Individual Identification Sheets

Tool Kit C – Getting Ideas Out – Stimulating Creativity

1. "Stop Session"
2. How are we Doing?
3. Outside Consultant
4. End of Meeting Feedback
5. Sample Stop Sessions
6. Sample End of Meetings Sheet
7. End of Meeting Evaluation Tools

Tool Kit D – Looking at Process and Participation and Evaluating the Meeting

1. Brainstorming
2. Small Group Techniques
   - buzz groups
   - small group work
3. Self Inquiry Method and Sample
   - internal society method and sample
4. Sharing and Integrating Ideas
5. Exchange of Successful Practices

Tool Kit E – Goal Setting and Action Planning

1. Eight Sources for Goal Settings
2. Discovering and Choosing Goals by Images of Potentiality
3. A Sequence of Action Planning

Tool Kit F – Role Playing and Skill Practice

1. Skill Practice Episodes
2. Using Role Playing Methods

These are condensed illustrations of the use of the planning procedures and sheets discussed in Unit 3. A sample physical arrangement sheet is included. as well as an illustrative meeting agenda plan.

These are just springboards for your own adaptations, and resource ideas to share as you help others develop their skills of planning meetings.

TOOLKIT A: ILLUSTRATIVE DESIGNS AND PLANS

A One Day Retreat 9 A.M. – 5 P.M.
20 staff members to plan a staff training program for the year

Preplanning Sheet

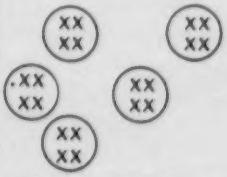
Participating Members	Desirable Outcomes	Ideas for activities, exper., resources, facilities
– 20 staff members representing a total staff of 60 – They are the profess. dev. comm. of the agency – Represent various depts. – Men & women ages 25-57 – Are eager to plan a good program – Some had been in the agency 15 years, others from 1 yr. on – Staff dev. seen as an important benefit of working in this agency as it's good in-service training	*1. That all planning staff get to know each other as human beings 2. They get to know and understand each other's jobs 3. They thoroughly analyze staff needs & requests 4. They discover an area or areas of emphasis for staff development. *5. They develop a preliminary design for the year's training plan 6. They develop a strategy of how to share their design with the rest of the staff & get feedback	A good accessible facility Arr. for meals Newsprint Ditto machine Ditto masters, pens, masking tape Various groupings Welcome warmup Staff questionnaires Design outline Anticipatory role playing Outside consultant Brainstorming

Summary of Outcomes: The planning group becomes a group and develops a staff development plan for the year.

*Most important to keep in mind

*Priority items

Planning Sheet

Time	Activities and Methods	Who resp.	Arrangements, etc.
The Beginning			
8:30	– Directional signs to meeting in place – Check on room & coffee - tea setup – Open windows & door – Have name tags ready – Greet people as they come in – Music on	2 comm. members	Chairs arranged for pairs to interview each other. Newsprint File folders String Pens – large, small Masking tape Name tags Tape recorders Audio cassettes Music-records Phonograph Ext. cord Ditto machine Ditto masters
8:45	– Ask persons to interview someone they don't know well and put the info on a file folder with their name on it. 1. Name 2. What they most enjoy in life 3. What they enjoy most about their jobs 4. What their own training needs are		
9:30	They wander around with their own file folders around their necks and meet the others, reading & discussing each other's		Music on in background
9:30-9:40	Quick total group discussion of interesting discoveries they made about each other	Chairperson	
9:45	In 5 groups of 4 they read approx. 15of the answered staff questionnaires re staff dev. needs, make a summary on ditto master.	Head of questionnaire task force	 Seating arrangements Ditto masters
10:30	Ditto masters are handed out & shared and major needs pulled out by total group & recorded on newsprint.	and a volunteer from the group	Newsprint
11:00	Discussion of the major needs in total group. Nomination of "candidates" to be tackled this year.	Chairperson	Newsprint
11:30	All "candidates" are listed on newsprint & each person is asked to vote for 2 priorities by putting check on the newsprint.		Large felt tip pens
11:40-11:50	Decision made & group divides itself into 3 task forces by choice.	Chair	

Time	Activities and Methods	Who resp.	Arrangement, Etc.
12 noon p.m.	Lunch No official program Time to talk, get more acquainted Consultant joins them & is introduced		–at small tables –served in next room
1:10	Presentation with discussion of how to design meetings & programs	Consultant now does consultation with each group	Design forms
1:30 3:00	Divide into 3 task forces to design training topics 1. Consulting skills 2. Training skills 3. Organization of time Three groups use consultant's design forms outlining how to design - to do their own plan of prof. devel. in their topic area on newsprint.		 Newsprint Pens Tape
3:05	3 designs are put on the wall for the other 2 groups to look at, critique & understand. Consultant helps too	Consultant	
3:45- 4 p.m.	Some comments by consultant on the designs & ideas for implementation	Consultant	
4:00	Total group brainstorms all the ways to communicate their plans & designs to the rest of the staff	Ch. person & one group member	Brainstorm rules on newsprint
4:15	They select priority ways to do this		
End of the Meeting 4:30	Total group discussion of who will do what to implement their chosen ideas. Group call out about feelings about the day Everyone gets a copy of agreed upon action plans & tentative dates. They set date, time and place for a followup meeting to report to each other.	Chair	Record on ditto
5:00	Linger longer – some stay to have drinks with one another & to talk		

Followup Actions

- Make arrangements
  1. for reproduction of designs
  2. for feedback of questionnaire results
- Thank you and payment to consultant
- Preparation of memo to all staff re plans and preliminary dates
- Notice for next planning committee meeting.

Regular Monthly Board Meeting

2 hours – noon to 2 p.m.
30 persons

Preplanning Sheet

Participants/members - their char. & needs	Desirable outcomes of this meeting	Ideas for activities, experiences, resources, facilities
– 25 Males ages 24 - 60 – 5 females ages 35 - 55 – 20 members of experienced Bd. members. – 10 are new this yr. – Mixed racial picture, native Amer., white and black, 1 oriental – *Some of the older members are on deck. They think it's a good thing to do – *Some of the younger members want to help change the organization to become more relevant	1. Mixing of old and new so they get to know each other better. 2. Discussion and decision on the affirmative action program *3. Increased understanding of the agency's budget needs and budget situation. *4. A feeling of commitment and cohesion. 5. Discussion of nominating committee report with time to add ideas. 6. To recruit some members to work on the future planning committee	– Sitting in pre-arranged mixed groups of 5 – brief reading material on affirmative action requirements. – Small group discussion before vote – Overhead transparencies with pictures of situation (overhead pro) – Lunch of ½ hr. – sandwiches & cokes, coffee, tea, with discussion on how we could improve our board meetings. – Report of these discussions to total Board

Summary of Desired Outcomes: To do some specific business and to increase Board cohesion.

*Star most important to keep in mind

*Highest Priority

Planning Sheet

Time	Activity and Methods	Who resp. for what	Arrangements & Resources room, mat., equipment
Start 1:30	Beginning of Meeting – Check on room arrangement – Check on luncheon & drink setup and availability – Make sure mat. & equipment are there and working – Have name tents ready for people to put their names on – Have seating chart up so people can find their table numbered 1 to 5 (assigned for mixed seating, new & old, young & older, male and female etc.) – Meet early and on-time comers personally – Directional signs to meeting place	Leader and two greeters	6 tables (round) for 5 persons- chairs · paper and pencils · name ten(s) · agendas Sandwiches & beverages paper plates, napkins, cups, salt and pepper cream & sugar. – Newsprint – Overhead proj. – Overhead Transpar. – Overhead pens – Seating chart – Nos. on tables – Instruments for lunch convenient on each table
12:00 noon	– As people come in they pick up their sandwich and beverage – A colored card on each table suggests that members discuss how Bd. meetings could be improved and the greeters help them with the instructions.	Greeters help	– colored instruction cards – Newsprint on each table to record ideas
	Continuing flow of the Meeting		
12:30	Greeting of Board Members – A short inspirational poem	Chair-person Ms. K.	Grooks No. 5 Piet Hein (see Bibliography)
12:35	Request by Chair for each table to report 2 important suggestions for Bd. meeting improvement	Chair	Collection of 5 newsprint records of suggestions
12:45	Discussion of the reports & agreement that a temp. subcommittee of 3 read the other items & come up with suggestions for improvement for the next Bd. meetings	Chair	Collection of 5 newsprint records of suggestions
1 p.m.	Present the minutes and discuss	Chair & Sec.	Extra copies of minutes
1:10	Nominations Comm. reports on its idea for broadening Bd. membership. Gen. discussion of added suggestions.	Nom. Chair-person	Copies of suggestions available

Time	Activity and Methods	Who resp. for what	Arrangements & Resources room, mat,, equipment
1:15	Budget discussion illustrated with pictures of present & situation - and future needs (on overhead transparencies) Table groups discuss & list questions - they star their key questions & ask them - get answers from finance comm.	Finance Chairperson & 1 finance committee member 4 finance comm. members	Overhead projector with transparency Newsprint
1:30	Vote on size of budget request	Finance chairperson	
1:35	Each table group is asked to skim again over the already mailed-out-to-them affirmative action proposal - then discuss - and are requested to formulate their table recommendations	Chairperson of task force	Pads of paper pens
1:50	Report progress & ask questions by table groups	Same as above	
Ending of Meeting			
2:45	Agree to continue to discuss affirmative action recommendations next Bd. meeting at the Comm. will summarize the recommendations so far. Volunteers are requested for Future Planning Committee. Agreement on next meeting time and place. Thank you to group and to agenda participants.	Chairperson future planning	Collect all recorded mat. for full record of the meeting

Followup Actions

- Reminder to temporary subcommittee on summary of Bd. improvement suggestions memo sent to them by chair.
- Affirmation chairperson sets date with task force to read, analyze the rec. & plan strategy for next Bd. meeting - maybe even a summary mailing just before the next meeting.
- Secretary gathers recorded material to include in the expanded minutes.
- Budget committee chairperson sets a meeting to discuss and implement Board actions.
- The Bd. Chairperson asks several Bd. members to meet and look at Bd. improvement suggestions after they are summarized to decide which of these could be implemented at the next Bd. meeting.

A Swimming Class

Diagnostic Planning for Designing Participatory Meetings

Thinking about the participants or members (e. g., how many, subgroups and individual differences, needs, readinesses, interests, expectations)	Some desirable outcomes of the meeting (e. g., skills, information values, concepts, actions, plans, recommendations, decisions)	Ideas for activities, experiences, resources to facilitate the outcomes (e. g., exercises, projects, resources, facilities, work groups
30 participants 10 girls, 20 boys Ages 8-11 3 black, 1 Vietnamese 1 handicapped • Wide differences in ability • Some very competitive, focused on making relay team; others just for fun and with friends; others required by parents Probably a couple will arrive late A couple will probably forget their locks, and at least one will be without a towel from home and without 20 cents for a towel. 1 volunteer high school age helper • (Star most important to keep in mind)	• Attitude of focusing on own progress, rather than competitive comparison with others • Those with higher skill interested in helping others, being helpers of the instructors Interested in the instructor's input, and practicing it. Everyone involved in selecting their relay team to represent class in race this week Positive girl-boy and interracial interactions in class • Legitimizing, accepting ability level clusters • (Star highest priorities)	Name tag band for choosing "pair-mates" for the period • Voluntary sub-clusters of 4 or 5 with a helper in each cluster • Demonstration by competent peer with support for tryout by peer helpers Helper to orient late-comers • Tryouts for relay team for this week • Feedback on how I feel about my progress • Tutorial work with handicapped • (Star what seem to be most feasible, attractive, appropriate ingredients)

Summary Statement of Desired Outcomes and Followups:

1. Helping members focus on own progress rather than competitive comparisons
2. Getting grouped in skill practice clusters with a helper-leader
3. Involvement in selection of mixed age relay team from the class

The Meeting Design: Timing, Flow, Assignments, Arrangements

Time Estimate	Activities, Methods, Groupings	Who responsible	Arrangements of space, equipment, materials
1. Pre-Meeting and Start-up of the Meeting			
(3:45)	(Class is listed as 4:00 - 4:50)		
15 min.	Pre-class, 15 minute meeting of teen assistants and peer helpers to review plans and volunteer for responsibilities	Adult instructor	Place to sit, refreshments Newsprint to jot jobs and names on
(4:00)			
10 min.	Each class member greeted as enters, check on shower, locker locked, towel, etc. Can do free swimming with "buddy"	By older helpers	Helpers at stations around the pool
2. Flow of Session after Startup Activities			
4:10	Quick general meeting of everyone re plan of session, announcement of relay tryouts at 4:30. Group members asked to form groups of 3 or 4 of about same skill for practice. An older helper with each subgroup.	Instructor and helper	Swim floats for those who need them for practice.
4:15-4:30	Small groups scattered around pool, each person practicing what he or she is working on from last diagnostic test	Helpers, with instructor & Y asst. moving from group to group	
4:30	Age level swim tryouts for mixed age relay team		
4:45	Age level squads vote for their candidates for team Give feedback reaction this week re this session		

Commitments, Followups, Supports

1. Plans for Ending the Meeting (e.g., closing activities, evaluation, reports of back-home plans, deadline commitments, etc.)

   Announcing relay team
   Thanking helpers
   Asking how many think they can do any
   practice before next class

2. Followup Actions Who? Will do what? When? Where?
   (e.g., often a directory of names, addresses, telephone numbers of participants is very important at this point, and getting any followup dates recorded in everyone's calendar)

   a. Brief "clinic" discussion (15 min.)
      with helper – giving feedback
      observations and discussing problems

   b. Check on who wants to be helper at
      next session – no pressure

   c. Setting a time when helpers can
      have free swimming and practice
      period

3. Cleanup and Other Immediate Commitments
   (e.g., what has to be returned, thank-you calls made, bills paid, etc.)

Community Theatre Program Committee

1-½ hours - 8:00 p.m.
7 people

Preplanning Sheet

Participants/members – their char. & needs	Desirable Outcomes of this meeting	Ideas for Active. experiences, resources, facilities
– 3 students from marketing class at the university – Pat - new member - attending first meeting – Stan - experienced, critical member – Phil - 50ish – Betty - 65 yrs. old enthusiastic - new – Alan - experienced helpful, good actor – Bob - young dancer and director – Edna - new - never attended before	– to hear report of marketing survey* – decision on promotion flyer** – fund raising ideas identified – decide on ways for board to select 6 plays for next season – contacts identified to recruit behind-the-scene persons	– seated at round table. check for another room or space for small group work – visual way to present marketing report – Brainstorm – small group to work on how Board can decide. Have data on past plays - by cost/number in cast/type.

Summary of Desired Outcomes:

To hear report from marketing survey*; get a lot of ideas for board talk of deciding on 6 plays***; have promotion flyer format approved.**

To have Pat and Edna feel good about involvement.

5-1

Planning Sheet

The Meeting

Time	Activity and Methods	Who resp. for what	Arrangements & resources, room mat., equipment
Beginning 7:00	Check arrangements, directional signs to meeting, place name tags or tents ready to use	Betty	1 table which can seat 10 persons
7:15	Meet with Pat to bring him up to date on committee plans	Bob	
7:45	Marketing students & professor arrive & receive welcome and name tags (tents)	Betty	Tape or Thumb tacks to put up marketing sheets
Flow of the meeting after start-up			
8:00	Review agenda and recording actions taken	Edna	Agenda on newsprint
8:03	Marketing survey report and recommendations. Questions and answers. Make plans to share report with board.	Students & staff person from Univ.	Thank them for coming and invite them to report at next Board meeting. Invite them to stay for rest of meeting.
8:40	Promotion folder. Presentation of sample layouts with casts. Decision on best layout.	Bob & Pat	
8:55	Decide on ways for Board to determine the plays we will do next year. Review way done this past year.	Alan	(15 minutes) Groups of three to work on improving selection method
9:10	Small groups report back and select best	Phil & Edna	Newsprint for brainstorming.
9:20	Fund raising ideas. All brainstorm selection of 5 best. Share with funding committee		Newsprint pens
9:35	Review decisions made. Set date, time and place of next meeting. Adjourn.	Edna	

Followup Actions

Action Steps, decisions	Who	When
Thank you notes to marketing students	Betty	
Have promotion folder printed	Bob & Pat	Not later than 6 weeks from today
prepare play information for Board meeting selection	Alan	By Board meeting
Share funding ideas with Funding Committee	Phil & Edna	before their next meeting

A Sample Physical Arrangements Briefing Sheet

You may need a copy of this for the custodian, or the hotel or motel liaison, or/and for your Subcommittee on Arrangements, (as well as for yourself.)*

Time of meeting:
Beginning _____
Ending _____

Date: _____

Place of Space _____

Number of People _____

Equipment _____
mike(s), easels, projectors, screens, etc.

Kinds of tables _____

Chair/pillow arrangement _____

Directional signs; bulletin board listings; directions to meeting.

Arrangement: (please draw)

*) be sure you keep a copy of whatever you send or give out

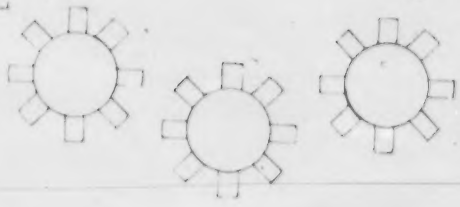
It would be helpful to draw a diagram of the physical set up you desire for your meeting. Here are two examples:

3 chairs

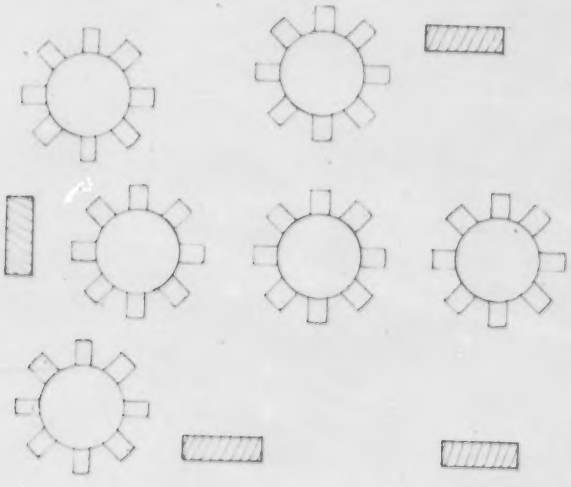
one head table
3 mikes

round tables of 8 each arranged around the room to seat approx. 50 people

or:



banquet with no head table and 4 small platforms, again round tables seating 8 each



An illustrative Agenda Sheet

Most groups use an "old Business" "New Business" type of agenda. We would like to suggest another format which is one that involves participants in a different way and makes the agenda into a work sheet.

The columns can be used as follows:
(1) **Timing** – Indicate the amount of time a given item will take (e.g., 15, treasurer's report and discussion) so you can see whether or not the number of items can be handled in the time you have available. Or, you need to cut something out or lengthen the meeting.
(2) **Agenda Item** – refers to the place or order of the particular item to be dealt with (e.g., minutes, nominating committee report, by laws discussion, etc.)
(3) **Method** – refers to **how** each item will be handled (e.g., report, total group discussion, small group discussion, film, brainstorming, etc.)
(4) **Who responsible** – refers to the name or initials of the person responsible for that item (e.g., Henry for greetings and prayer, Judy for opening remarks and call to order, etc.)
(5) **Resources, Material** – Here for each agenda item you list the necessary resources and materials (e.g., coffee, tea, newsprint, scratch paper, pens, name tags, pins, minutes from last meeting, etc.)
(6) Each item has a specific disposition. These include: information, inspiration, reporting, policy making, decision making, discussion, recommending. Indicate for each item what its disposition is and this will help indicate the time needed on the agenda.
(7) **Follow-up Action** – column should indicate for each item what, if any, follow-up action is indicated. If there is none, it helps to write in the word "none".

Meeting:
Date:
Time:
Place:

Purpose(s) or desired Outcome(s) of this Meeting:

Timing (1)	Agenda Item (2)	Method for presentation etc. (3)	Who responsible (4)	Resources Materials (5)	Disposition (6)	Follow-up Actions (7)

50

TOOL KIT B: BEGINNINGS OF MEETINGS

Beginnings of meetings are important because they set a climate for and give a feeling about the meeting to the participants. They can help make people feel glad they came because the setting is organized, warm and ready. Also it helps to have beginnings that can start when people get there, rather than some people having to wait for others. There are many ways to begin; we give a few sample ideas here.

1. **Greeting Sheet**. This is a large piece of paper or cardboard that has greetings and beginning instructions on it. (e.g., "Hello - Good morning! Please help yourself to tea or coffee and sit with 2 or 3 people you don't know to get acquainted. Please talk about what you hope this meeting will accomplish".)

2. **Paired Interview**. As soon as two people have arrived, they are asked via a greeting sheet, or verbally, or with instruction sheets, to interview each other. They are provided with two file folders, and they record each other's information on the folders. The questions might be: name; kind of job you do; things that turn you on in life; that turn you off in life.

When both folders are finished, each person wears his/hers around their neck and walks around to meet and greet the other participants.

You can adapt for later resource utilization whatever information you might like (e.g., special skills people have or/and special needs, etc). These folders can then be posted alphabetically on the wall and become a resource inventory for the group. If the group is large it helps to take Polaroid pictures of all participants and paste each persons picture on the file folder- great for identification purposes.

3. **Name tags** can be varied in size, shape, color, simplicty and/or complexity — here are a few ideas:

- use 3 x 5 cards with pins and have people write their name and favorite hobby
- use colored paper and let people cut out and fill out their own
- put out a variety of paper pictures, scissors, pens, glue, etc., and encourage people to make a collage of their name

4. **Sign-In Sheet**

Make a large wheel listing all the functional parts of a typical community and have people sign their names in each part of the wheel to see what parts of your community are represented.

5. Post one **large sheet of paper on the wall for each participant:**
   - if possible, put each one's name on the sheet.
   - as they come in, give them each a felt pen and ask them to fill out their own sheet according to the instructions
   - have a large instruction sheet; or run off individual sheets with instructions, so people can been as they arrive.
   - the kinds of things they might answer are:
     - name
     - favorite activities
     - things they could help others with
     - things they need help with

Now perhaps these ideas will trigger others in you. Just take time to plan your beginnings. This effort will be translated into a better and more productive meeting.

TOOL KIT C: LOOKING AT PROCESS AND PARTICIPATION

One of the most effective procedures for improving the productivity and satisfaction of any meeting is to use one or more of the available procedures for helping the group review their own working process and make decisions about ways they would like to make their work more satisfying and productive.

Such "process checks" may take no more than 10 minutes, and the saving is many times this. Here are four ways used most frequently to review the work process.

1. A **"stop session"** tool is used to help a group quickly collect data on "how they are doing" and to make decisions about what improvements they would like to make. See some samples of such tools in this toolkit.

2. When the agenda is developed, an item about midpoint in the agenda is entitled **"taking a look at how we're doing."** The leader asks the group to share diagnoses and help with ideas for improvement.

3. An **outside consultant,** or a member of the group, is asked to serve as a process observer and to make observations when he or she sees an opportunity to make comments that will help the group become aware of blocks in communication or possible alternative procedures that might be helpful.

4. A fourth procedure is an **end-of-meeting feedback instrument** that permits participants to give reactions to the meeting as a basis for improving the process of the next session. A sample of such an end-of-meeting sheet follows on page 74.

5. (A Sample Stop-Action Tool)

Brief Stop Action Check

To help improve our productivity

1. How do you feel about how you are being listened to?

(please check)

very satisfied	fairly satisfied	just so-so	somewhat dissatisfied

Please comment on why you checked where you did:

2. How fully do you think you have been listening to and using the ideas of the others?

(please check)

very fully	pretty well	not too well	quite poorly

Please comment on why you checked where you did:

3. Please share your data with each other and agree on an idea or two on how you might improve the group's work as you continue.

Communication and Group Productivity — A Quick Check

1. What barriers to communication, if any, seem to be operating in this meeting? (Please name one or more)

2. What can be done to improve group productivity? (List one or more ideas)

3. Please share your thoughts on the 2 questions and decide what the group might do to improve the way you work and think together.

End of Meeting Feedback Thoughts

1. How do you feel about what we accomplished in this meeting?

very satisfied — fairly satisfied — somewhat dissatisfied — quite dissatisfied (please check)

Please comment on reasons for checking where you did:

2. How do you feel about the way we worked on our tasks?

very satisfied — fairly satisfied — somewhat dissatisfied — quite dissatisifed (please check)

Please comment on reasons for checking where you did:

3. What are suggestions for our next meeting? Procedures? Agenda? Physical arrangements? Leadership? or anything else.

Sample Evaluation

1. WHAT THINGS WERE MOST HELPFUL TO YOU DURING THIS WORKSHOP? PLEASE LIST.

2. WHY WERE THESE THINGS HELPFUL TO YOU?

3. WHAT WAS LEAST HELPFUL?

4. WHY WAS THIS SO?

5. WOULD YOU LIKE A FOLLOWUP TO THIS WORKSHOP PLANNED? IF YES WHAT DO YOU WANT TO HAVE INCLUDED?

6. OTHER COMMENTS

Another Sample Evaluation Sheet

Well, I learned _____

And what did you learn about yourself as a leader at the conference? _____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

By golly, I learned _____

And what have you learned about yourself in relation to your group?

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Next week I think I'll try _____

What is something you think you will do differently now?

_____

_____

_____

_____

_____

_____

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Still Another Sample Form

1. How relevant was this session to my here-and-now needs?

highly relevant	fairly relevant	slightly relevant	not very relevant	(please check)

2. How probable do you think it is that you will put into action any ideas from the session?

highly probable	quite probable	slightly probable	not very probable	(please check)

3. What do you think might be an outcome in your back home situation (if any)?

4. Please give any feed back comments to the leader(s) of this meeting (e.g. about leadership style design of the meeting, content of session, your feelings, etc.)

TOOL KIT D: GETTING IDEAS OUT AND SHARED

There are many ways to help group participants "uncork" and share their ideas. We share here a few that we have found particularly useful in a wide variety of situations. Included are: brainstorming, small group techniques, self-inquiry method, and exchange of successful practices.

1. Brainstorming!

The **purpose** of this method is to get out as many ideas, on a given question or problem, as possible, utilizing **all** the resources of the group without stopping to discuss or judge the worth of any of the ideas during the actual brainstorm session.

The **time** required varies from 10 to 20 minutes depending on the size of the group and the complexity of the question.

The **size** of the group we find best is between 3 and 15 persons. One person can brainstorm alone and sometimes 2 people can do well if this seems necessary or desirable.

Recording the ideas is very important. One person can do this or the responsibility can be shared. It helps to have large sheets of flip chart paper and a broad tip felt pen, so that the ideas can be seen going on the sheet and can be easily read afterward.

The **question** to be brainstormed about must be one to which all the participants can speak, e.g.,

- all the ways to recruit volunteers
- all the ways to improve our meetings
- all the ways to give information other than through speakers, etc.

There are **4 rules** that help group members to do productive brainstorming. Have these rules available to the group through a verbal listing and/or posting them in easily seeable written form:

1. List all the ideas anyone has
2. Do not discuss
3. Do not judge — **all** ideas are go!
4. Repetitions are O.K. (just put the idea down again)

A helpful hint is to say to the group that if they hit a plateau or silent periods: "Just **enjoy your silences** because often the best ideas come after the silence."

After the brainstorm it is possible to do a variety of things with the product(s). For instance:

1. Encourage group members to look over their list and star the 4 or 5 priority items and report those.
2. If several groups are brainstorming the same question, put the lists on the wall with masking tape and have participants mill and read each other's and mark on each other's sheets those they find most exciting or feel are priorities.
3. Or have them check all the items they feel they could do easily (such as ways to improve their meetings)
4. You'll find other uses.

Just be sure that there is a use made of the brainstorm product(s). Most people love to brainstorm and enjoy seeing their ideas recognized and utilized. It is one of the best ways to help non-participants become active.

Self-Inquiry; Anticipations and Predictions

As you look around the circle of your group, which is about to begin working together, please reflect on and jot down ideas on the 2 questions below.

1. What are some of the factors which you feel exist in a new group like this that will block free and open communication?

2. What initiatives might a member like yourself take to help the group begin removing such blocks to communication?

3. Please share some of your self-inquiry reflections with fellow group members for a few minutes.

2. Small Group Techniques

Buzz Groups – here 2 or 3 persons "buzz" - talk for a short period of time in response to an instruction from the leader like:

List: – Your questions about what you've just heard
– Your ideas on how to help shy people participate
– Your ideas on how we can improve our group's productivity

Small Work Groups vary in size from 3 to 7 or 8 persons. Members are requested verbally and/or in written instructions to do a particular task or set of tasks. For example:

- Members are asked to list their goals for this meeting and then to mark priorities on their list
- Each work group has a different question to answer or problem to solve (e.g.,
  - ways to recruit volunteers
  - ways to train volunteers
  - ways to keep volunteers happy
- Sometimes each work group is asked to brainstorm something (e.g., all the things a good leader does to help the group; all the ways to design our annual meeting, etc.)

3. Self-Inquiry Method

This is a way to help participants to work by themselves and to focus on some particular item of content. The purpose may be to help them think through something before discussing it in a group (see, the following self-inquiry sheets as examples.)

Internal Society – (another type of self inquiry)

The purpose may be to give the participant a chance to think about how she/he feels about something, to give insight. An example of this is the "Internal Society" and "Invisible Committee" notions. (Following is an example)

Our "Internal Society" and Our "Invisible Committee"

Whenever we face a decision to try something new, there is an internal dialog which starts up inside us (parts of our selves that feel and think one way and other parts of us that feel and think differently). Also, we become aware that there are other persons in our lives who are influential reactors to our ideas and actions. As you think about changes you want to make, it will be helpful to do these two internal inquiries for a few minutes:

Internal Dialog	Invisible Committee Reactions
What do the various voices inside you say about your new change ideas, pro and con?	Who are the persons and groups who you can visualize as supporting or questioning or rejecting your new ideas? What are they saying?

These are just a few ideas. You can adapt these to your own needs and invent new ones that help translate your designs and hopes for outcomes into a fun meeting.

4. Sharing and Integrating Ideas

When a group is divided into subgroups to do work, there is usually a need to report the results of each group's work and ideas. There are a variety of ways to do this. Here are some:

1. Each group reports out verbally their 2 favorite or best ideas. When each group has had a chance to do this other ideas can be added.
2. Reports are written out on newsprint and hung on the wall for the others to read. This makes for a useful "break" time since people can pick up a cup of coffee, go to the lavatory, etc., in addition to milling and reading.
3. Verbal reporting from each group, with one person recording the ideas on a large sheet of paper or on a transparency on an overhead projector for all to see.
4. Put reports on ditto masters and reproduce enough copies for every participant.
5. Give the reports to a summarizing committee who will integrate and summarize all the ideas.
6. Ask each group to make a non-verbal report of their best idea.
7. Report out and share results via a picture, collage or paper bag puppets.

It is important to remember that the reporting, sharing and integrating activities should be brief, varied, interesting and useful.

5. Exchange of Practices

The invention of useful social practices in not unusual. New ways to greet or group people, ideas for motivating the apathetic, a novel room arrangement, etc., are all social inventions that should be useful to more people that just the inventor. Yet such practices are rarely shared in a way that the next person can really adopt or adapt them.

Non-sharing is due to many reasons, ranging from lack of knowing how to do so, to modesty about one's own ideas, to possessiveness, fear of rejection, to high competitiveness.

We have found that people like to share new ideas when they are given some help to do a productive job of it. Here is a format to guide you; you will want to adapt it to your needs.

Usually each person in the group is given the interview form. Then the leader asks each person to share one practice that has worked for him/her on some agreed-upon topic (e.g., "ways I've motivated people to participate in meetings," or "ways I've helped kids learn" etc.). Everyone who has a successful practice on this topic mentions what it is. Someone writes the topic with the contributor's name on a large sheet of paper. After everyone who wants to contribute an idea has done so, the group votes on the priority ones they want to hear about in detail. These are starred and then the first exchange-of-practice interview begins. Questions are asked in the order on the form. One person records the answers and has them duplicated as soon as each interview is finished.

It is possible to record the answers directly on a ditto master and ditto enough copies for everyone. Or, a Xerox machine can be used. When neither of these are available, everyone takes his/her own notes on the form that has been provided to each person.

EXCHANGE OF PRACTICES INTERVIEW FORM

Name of "Inventor" _____

Address of "Inventor" _____

Telephone _____

1. **What** is the practice?

2. **Describe** it so the listeners can see it in their mind's eye (give steps involved in doing it)

3. **Where** and **with whom** can it be used?

4. **Facilities** needed

5. **Costs**

6. **Problems** to watch for

7. **Any evaluation** of it? What?

8. **Adaptations?** (Of the practicer or anyone else in the group)

TOOL KIT E. GOAL SETTING AND ACTION PLANNING

Setting long range and short range goals is one of the important agenda items in many groups and their meetings. And just as important as a good process of choosing goals, is the planning to take the best actions to implement these goals. From where do we get our goals? Here are eight sources of ideas for goals that we have identified:

1. Eight Sources of Goals

Goal Source #1: From those being served

The needs, expectations, confrontations of those we are trying to serve through our eductional efforts, i.e., the students, are a very important source of good ideas. What are signs of discontent and boredom? How are they feeling about learning? What growth are they showing or not showing?

Goal Source #2: From Significant Others:

The organization is surrounded by other systems and persons who make up its environment - e.g., the economic system of business and taxpayers, the political system of voters, liberals and conservatives, youth with their ideas, the parents with their expectations, hopes, concerns; people serving agencies that can offer or withhold collaboration. They have important ideas to be considered.

Goal Source #3: From the Successful goals of others

Agencies and groups of all kinds are also continuously projecting goals and trying to achieve them. Some have had very exciting success experiences that have relevance for us. What are they?

Goal Source #4: From policy-practice discrepancies

We have previously set goals and policies. What are the discrepancies between these intentions and what we are actually doing? Closing some of these gaps could be important goals.

Goal Source #5: From listing our Current Problems

From such a list we select the priorities on which to work.

Goal Source #6: From predictions about the future (See Futurist Magazine listed in Bibliography)

Many predictions and projections of the future are being made by futurists and long-range planners. What implications do these predictions have for our goal setting?

Goal Source #7: From our Images of Potential

What would the best programs we can imagine look like in action? Do we agree on these?

Goal Source #8: From Our Own National Leadership

What ideas for goals and plans are in the minds of the leadership of our systems? Have they been set down in writing? How much commitment is there?

2. Discovering and Choosing Goals by Images of Potentiality[1]

[1]From *The Humanized Future: Some New Images*, by R. Fox, R. Lippitt, and E. Schindler-Rainman. (See Bibliography.)

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A typical way that most groups set goals is to list the problems they want to do something about and to decide what the "problems" are.

An analysis of this approach has uncovered several interesting facts that led us to develop another approach:

1. We discovered that when a group is listing its problems, the voices became more and more depressed.
2. And more and more comments indicate a sense of impotence or futility about action-taking and problem solving.
3. And there are more and more comments that attribute the causes of problems to "outside forces we can't do anything about.' "
4. As we listened to a wide variety of groups setting goals and priorities after such a "problem census" we noted that their goal selections were oriented toward "getting away from pain (problems)" rather than "going toward some positive image of desired achievement."

As a result of this analysis we have developed a future oriented approach to selecting action goals.

Taking a Goal-Setting Image Trip Into the Future

Your work group (or committee) will be making this trip together. You need a large sheet of newsprint and a person to act as recorder who will jot down your images as you report them.

You are projecting yourselves ahead in time – a year – and making observations of what you see going on in your setting, speaking in the present tense, – you are there! Be concrete in reporting what you are seeing that pleases you with what is going on.

You are not predicting what you think will or will not happen. And you are not expressing unreal fantasies. You are observing desired developments which have a sense of reality-feasibility of highly desirable future. Be creative. Use imagination. But be realistic. O.K., here are some instructions for the trip – the focus for your observations.

Suggestions for Your Observations

It is one year hence and you are looking down from your helicopter. You are pleased with what you see. You are seeing your group working together, and the various things you have caused to happen. Describe in the present tense how your group is functioning and what is happening, because of your efforts, that please you. Write down all the things that you are pleased about and you can see happening. Be as concrete as possible.

Selecting a Priority Image

After your group has listed all the images of potentiality they can project, you are ready to return to the present, and in the present, review the list of potential images. The job now is to select a priority image (or possibly two) which the group agrees is the most important to achieve and which they want to plan to start work toward. If the group is as large as, e.g., 7-15, you will have the resources to select two priorities and divide into two subgroups for planning. You will probably use a number of criteria for choosing your priority image(s), e.g., program importance, feasiblitiy, sense of commitment by the members of your groups, etc.

Translating Your Priority Image Into a Goal Statement

Your desired image of the future new needs to be formulated as a goal. It is important to make your goal as clear, concise and specific as possible. To do this try to state it in such a way that you can know when it has been achieved; that is, the goal must be measurable and do-able. Also, it is important to set a beginning and ending time for accomplishing this goal. Most of all, the goal should be realistic. It should be something which you feel you stand a good chance of achieving. If it would be pushing your luck, or would be something very difficult to achieve in the time allotted for it, perhaps you should amend it, trim it down, clarify it further, or choose a different goal.

Two examples of a goal statement which meet these qualifications might be: to get a program started of teen volunteers helping lead activities of youngers; or, to have a program of recruitment and training of the teens started by this time next year.

3. A Sequence of Action-Planning

Diagnosis of Helps and Hindrances
(an adaptation from Kurt Lewin's Force Field Analysis)

With your goal statement at the top of a large sheet, make a chart as illustrated below, to list all the factors (forces) you can think of that will help, support, push toward the goal (lefthand list) and all the factors (forces) that might block or hinder movement toward the goal.

GOAL STATEMENT: _____

Supporting Forces	Hindering Forces
Forces inside of persons	
Forces between persons	
Forces in the situation and/or institution	

Please note we have suggested a way to clarify your forces as you list them on the chart:

1. Some forces will be **factors inside yourselves** and other persons (e.g., lack of skill, ambivalence, enthusiasm, or bias about importance of goal)

2. Other forces will be generated by the relations **between people** or the style of the group (e.g., norms against trying anything new, conscensus about importance, etc.)

3. Other forces will come from the **characteristics of the large environment** and institutions, such as lack of resources, budget, supportive policy.

Make as complete a list of factors as you can, realizing you may not have the data to be sure how strong some of them are – but make the best guesses you can.

Brainstorming Removal of Hindrances and Mobilization of Supports

Brainstorm #1: (see brainstorm rules on page 78)

Now brainstorm all the ways to remove the hindrances you have listed.

Brainstorm #2:

Next brainstorm all the ways to mobilize the supports you have listed

Selecting Feasible Action Priorities

Look at each of the two brainstorm lists you have just produced. Discuss each list and select from each the three, four, or five items you consider priorities for action for you. Star or circle these items so that they are easily identifiable.

Steps of Implementation

You are now ready to move to actual action step planning. It is suggested you include the following:

a. List **who** besides you is needed to work on the priorities you have selected.
b. **How** will you recruit these persons and **who** will do it, **when**?
c. **How** do you begin on the action steps? **What** do you need to do?
d. **Who** will do what to get started?
e. **Where** to start?
f. **When** will the group report to each other on progress?
g. **Who** will convene the next meeting?

Planning for Follow Through

It is important to have follow up meetings to support each other; to change plans or re-group; to report progress, or lack of it; to make new or additional plans. This follow-through can be done through face to face total group meetings; through subgroup meetings; and/or through telephone conference calls.

Try it! You might enjoy this way of working on goals and seeing your own progress on reaching them.

TOOL KIT F: ROLE PLAYING AND SKILL PRACTICE ACTIVITIES

1. Skill Practice Episodes

Some especially useful triggers and ingredients of program are audio taped or written episodes from which skill practice opportunities can be developed, or you can create your own tape episodes which should always be very brief and end at a critical "what would you say now" punchline.

Here are the guidelines we use for the flow of a skill practice exercise.

Guide Lines for Skill Practice

1. Select an appropriate situation to play.
2. Read it, it sometimes helps to read it twice for your group.
3. Now, using the brainstorm rules (page 78 of the tool kit) brainstorm all the ways the situation could be handled.
4. From this list select one, or a combination of several, that you would like to try out.
5. Select persons to play the roles in the situation, and one to direct it.
6. Decide on a time and place where it takes place.
7. Now start with the last line - or play the whole situation as you've just heard or read it.
8. Keep going and try the method for handling you have selected. Keep going a few more sentences until the director cuts it.
9. Now discuss how it went - how the participants felt - how it could be handled even better.
10. Try the same situation again with the new suggestions. Discuss.
11. Try it as many times as you like until you feel you'd be able to handle it easily.

2. Using Role-Playing methods*

Role playing is probably one of the oldest, most used, and most useful means of "laboratory learning," or learning by direct experience in a simulated, risk-free setting. In meeting and helping situations, role playing is often very helpful in working on specific, real problems in a "safe" setting - where issues can be clarified by graphic, behavioral communication; where people can learn to understand better the viewpoint of others; where new behaviors or action-alternatives can be tried out with no risk of failure (or, more exactly, no negative consequences of failure). In fact, there are no mistakes and there is no failure in a role play situation, since the examination and understanding of ineffective behavior can be extremely valuable to the participants.

How Role Playing Gets Underway

In a role play situation the planner, leader, consultant, or facilitator provides a clear definition of the situation, in as much detail as is necessary. Often, a few words of description are enough. Individuals are then selected (or volunteer) who are cast as characters to play the various roles in acting out the situations. These are individually briefed in the parts they are to take. This may be done publicly, privately, or through prepared, written role descriptions. There may or may not be an audience; that is, in a small group everyone may be involved (though it would be generally desirable to have one or more observers), or in a large group there may be "multiple" role plays, or the role play may be performed before an audience.

* Adapted from paper by Marshall Sashkin and Peggy Lippitt.

The acting may be ended when the problem is clearly illustrated, may merely be interrupted for discussion and continued, or may be carried through to a natural conclusion. Discussion of the situation and learnings would follow.

Aims and Uses

While we have given a general background description of the uses of role playing, this learning method is actually suited to a variety of specific learning purposes;

(1) **To clarify and vividly illustrate a problem situation** of some specific **behavior**. The role play situation provides surprisingly vivid and real information about problems and affords an opportunity for visually examining behavior which no amount of discussion could do.

(2) To provide a group with a **background of common experience** for discussion. A clear, shared frame of reference is very helpful for effective communication around complex issues.

(3) To **involve more intensely a group** of individuals in a discussion situation. Either before the audience or with multiple groups, the role play method is generally interesting and involving for participants and observers.

(4) To **provide a additional or alternative medium of communication** and expression. To say and to do can be very different; role playing can clarify and add to what can be said in a discussion and can serve to express feelings, via behavior, which are often hard to verbalize. In addition, role playing can be used as a **feedback-check** or understanding of directions or instructions.

(5) To **help people understand a situation from the viewpoints of other persons.** Role playing is one of the best ways to help people develop empathic understanding - an appreciation for the thoughts and feelings of others. Furthermore, in some situations it has been shown that the technique of role-reversal - two persons who take roles or positions opposite to their "real" positions - can lead to more positive feelings toward the other person and their position. Thus, role playing can sometimes lead to sympathy as well as empathy (or understanding). Sometimes a situation is played twice to give two different participant experiences in handling the situation.

(6) To **give insight into the behavior of one's self and others.** Through role playing, participants can find out how their behavior affects others, with no fear of any real negative consequences or reprisals. They can also gain clearer insight into the behavior of others; misconceptions can be mitigated or removed.

(7) **To teach new behavior** through modeling. When instructed to behave in certain specified ways, new, more effective behavior can be modeled for an audience by the role players. Alternatively, the instructor or leader can model such behavior as a participant in a role play situation.

(8) To provide a **no-risk setting for trying out new behavior.** As well as examining the effects of present behavior, participants can experiment with new, alternative behaviors and see what the results are, with no risk of negative consequences. Also the participants can try to express their intentions in behavior and see if they can effectively do so and if the results are as was intended.

(9) **To practice specific behavior skills.** Students or trainees can have a realistic opportunity to practice specific behavioral skills that will improve their abilities for example to chair a meeting, to speak in front of a group etc. Participants thus develop proficiency in these skills, can clearly see their progress, and can examine the results.

(10) To **evaluate alternative behaviors or actions.** A variety of action-solutions for a problem situation can be tried out and the best behavior-actions can be clearly determined.

While all of the above uses are valuable, the most important aims or reasons for using role play methods are generally the development of empathic understanding; understanding the effects of one's own and others' behavior; discovering new, more effective behaviors; and training and practice in specific behavior skills.

Types of Role Play Situations

Basically there are two general methods for preparing a role play: **extemporaneous,** verbal definition of the situation and roles, or **prepared,** written briefings as to the situation and the roles.

When the **role play is extemporaneous,** the situation must be described very briefly and clearly, and the roles cannot be overly complex. The role players can, however, be briefed privately, if this is seen as desirable. In some ways, written roles give as much flexibility as extemporaneous preparation. More adequate role descriptions, with more complex situations, are generally possible. In general, extemporaneous role playing is most useful when the issue centers around a real or anticipated problem, while written role briefings are best for training in specific behavioral skills, which the role play can be designed to emphasize.

For either type, there are **two general categories of use: on-stage role playing** and **multiple group role playing.** In on-stage role plays, two or more persons are involved in the role play while others present are either observers or are asked to identify with one of the actors. One advantage of this procedure is that everyone experiences the same situation but in later discussion a variety of different interpretations are usually given, thus making for lively and potentially insightful discussion. However, if the role play takes much time, observers tend to become bored and lose interest. Thus, this method requires considerable skill on the part of the leader, in deciding when to interrupt or end the role play, or whether to "prod" the role players to "move along."

The multiple role play in small subgroups was developed by Maier and Zerfoss (1952) for use with large groups, up to forty or fifty persons. They may work either on the same or on different situations. While a high degree of involvement is generated, since everyone is a direct participant, there are some problems. For example, it often happens that groups will reach points of completion at different times. Thus, some participants may engage in private conversations, lose interest, exchange role information which it may be desirable to withold until the discussion period, or become disruptive for those still involved in the role play. With groups of fifty or more it can be difficult to hold a good post-role play discussion. Obviously, the number of discussion participants tends to be limited. Still, the variety of experiences of persons in the same role situation provides rich comparative data for discussion.

Procedures

Following is the normal sequence of steps in actually using the role play method. These steps are generally applicable to any type of role play situation. Any printed role materials needed should, of course, be prepared well in advance.

(1) **The situation should be described briefly, clearly, and succinctly.** This should be done even if a written description is given to the role players and/or observers, although in that case the description may be even briefer. Although we cannot go into great detail here on the design of role play situations, the user should, in developing a role play situation, always keep in mind the primary purpose or aim he or she has in using this method. The role play should be tailored to this purpose, with the principle of parsimony in mind; that is, use the minumum number of characters, and make any description as brief as is needed by covering only essential facts.

(2) **Choose the participants.** Sometimes calling for volunteers is useful, but sometimes this is not desirable, since a poor performance could result in the individual's "losing face" before his or her peers. Also, it is generally important **not** to place a person with a specific real problem in a similar role. In many circumstances it is desirable to pre-set group composition, such as to avoid groups in which a superior-subordinate pair (in real life) have these roles reversed. While there may be time when such a reversal might be desired for a **specific** purpose and intent, this should not be allowed by chance.

(3) **Brief the actors.** When written roles are used, allow adequate time for all participants to finish reading. It is not generally desirable to provide written roles that are so long and complex that the role players need to be given them to read over and study beforehand. Allow time for any questions. When the briefing is verbal be **sure** to check whether the participants clearly understand their roles. It is generally helpful to tell participants to simply make up any information they need which was not covered in the briefing, but to avoid making up facts just for the sake of doing so. If necessary, the participants can be given a few suggestions as to how to behave.

(4) **Assign tasks to the audience or observers.** When there is an audience, or when individuals are assigned to observe in a role play group (for multiple role playing) it is generally helpful to assign specific tasks. Sometimes part of the audience or certain observers can be asked to identify with one or another of the role players, acting as alter-egos or advisors. Or, printed observers' sheets can be used with brief instructions on what to watch for and keep track of (e.g., "note how many times each person speaks"), depending on the specific aim of the role play. This is an excellent way to provide good data for post-session discussion.

(5) **Set up the scene.** Label props, if any; show each participant where he or she should physically be and move to. A very brief introductory summary can help people get into the mood – "Mr. Smith, you're pretty annoyed at Joe, and you want to clear up this issue, now!" Make use of imagination – "this table will be a very big, classy executive desk." Few actual props are needed, when imagination is effectively used.

(6) **Start the action.** In multiple group role playing it is helpful to have all groups start at the same time, on a signal.

(7) **Don't let the role play go on too long.** While it is often desirable for each group in a multiple role play to reach a natural point of conclusion, slow groups **should** be pushed to finish and, eventually, simply stopped. When the role play is on stage, continuing is tempting, to see what will happen, but it is even **more** important in such cases to end as quickly as possible – when the problem is illustrated, when the point has been made, etc. Even a few minutes of an on stage role play provides enough data for a thorough discussion; longer times overload the audience with information. It is also often useful to stop the action, discuss, and start again, either from the beginning, or with alternations ("pretend those last few sentences weren't said") or with advice for participants.

(8) Debriefing – **Thank the role players, using their real names.** For on stage role playing this is important, because it returns the participants to their real identities. Discussion can then be far more objective and is less likely to hurt any of the role players. "Mr. Jones" may have made some bad mistakes, but Joe Blake, who played that role, doesn't have to feel bad for "Jones" errors.

(9) **Discuss what happened.** The design of a discussion will depend very much on the specific situation and purpose of the role play. In general, the more views that are represented, the better. As in any discussion, the instructor or leader should try to keep the group on the right track without being too directive. When the multiple group role play procedure is used, discussion generally centers on comparison of outcomes, reports of observers (if any), and the feelings of participants about specific issues and behaviors. Some general guidelines for a discussion are:

   a) determine what happened
   b) discuss how the outcome could have been better; what would the most desirable result have been? Why?
   c) explore the reasons or causes for why the situation developed as it did and why the role players behaved as they did
   d) try to identify what could have been done differently (and by who) to bring about a more desirable outcome.

(10) **Repractice.** A logical follow-up to 9d is to try out some of the actual behaviors that were suggested. This can be done on stage, and if so a new group of role players may be desirable. Alternatively, the new behaviors can be tried out in multiple groups working simultaneously even if the model role play was on stage. Whenever role playing is used specifically as a skill practice exercise, it is desirable to repractice, often with roles reversed.

UNIT 9 MAKING YOUR OWN BETTER MEETINGS

S1

UNIT 9 MAKING YOUR OWN BETTER MEETINGS

We wish we could be with you as you discover and tryout the many possible applications and adaptations of the ideas, tools, and designs we have shared with you. As you well know, good ideas do not automatically convert themselves into successful practice. It requires some trying out and development of specific skills. And it is almost always a matter of personal adaptations to your own unique situation and personal style.

In it's rough draft pre-publication form we found a number of ways to use this volume to help improve our meetings, and those of others. These may be helpful to you:

1. We used it as a stimulus for ourselves, to discover alternative ideas before we decided on a particular design for a meeting, or conference, or class.
2. It was very helpful as a resource in consulting with the leaders of committees and staffs in helping them to improve their regular meetings.
3. We used it as a "text" for workshops and institutes on the designing of effective meetings.
4. It was helpful with the program and planning committees of conferences and annual meetings.
5. In our work with Organization Development staffs in industry and business, it has proved a very helpful resource.
6. It proved to be a stimulus in working with faculty groups on getting more participation and involvement into classroom teaching.
7. We found the toolkit a helpful reference in selecting instruments to duplicate or to modify for particular groups and persons.
8. It has proved helpful as a resource for the many planners of organization programs who are seeking ways to make their meetings more interesting for their membership, e.g. the Rotary Club, Kiwanis, Junior League, PTA, Chamber of Commerce, Downtown Merchants, Agency Board Meeting, Environmental Action, etc.
9. Several groups of young people have found it a help, in improving the meetings of the Student Council, the Inter-Club Council, the Junior Achievement Board, and the 4-H Officers Council.

This is a sample of the uses we remember as we complete the revised draft of this volume for you.

One other tip: We keep two folders as supplements to this resource book. One folder is for the plans of meetings we have designed or helped design. The other folder contains copies of all the tools we have used in such meetings - start-up briefing sheets, evaluation sheets, feedback and stop-session tools, role-play instructions, etc.

And to repeat the invitation with which we began this volume: If you share with us your critiques, adaptations, new materials for improving your meetings, we'll find a way of integrating these, and producing them as a successor to this volume.

Good Meetings!

BIBLIOGRAPHY

Auger, B. Y. *How to run better business meetings*. St. Paul, Minn.: Minnesota Mining and Manufacturing Company, 1972.

Written by the general manager of the Visual Products Division of 3M. The contents are blueprints for turning any meeting into a productive experience. The material on visual aids is of particular help.

Haiku harvest (Japanese haiku series IV). (P. Beilenson & H. Behn, trans.). Mt. Vernon, N.Y.: Peter Pauper, 1962.

A lovely book of haiku poetry useful in starting or ending meetings. It also may be used to initiate philosophical discussions.

Benne, K., Bradford, L., Gibb, J., & Lippitt, R. *The laboratory method of learning and changing: Theory and applications*. Palo Alto, Calif.: Science & Behavior Books, 1975.

The concept of the unstructured T-group and the beginnings of the laboratory method may properly be said to have started in 1946 when four leaders in education convened a workshop on intergroup relations at the State Teachers College in New Britain, Connecticut. Kenneth Benne, Leland Bradford, Ronald Lippitt, and Kurt Lewin originated those early concepts and methods, which since then have become diversified and spread into many institutional settings and into many parts of the world. The authors of this book have expanded on their earlier volume, *T-Group Theory and Laboratory Method*, often referred to as the "trainer's Bible." The newer book, destined to become another classic, is a quest for justifiable answers to the question "What is laboratory method?" This quest leads readers through a variety of theoretical discussions and evaluations of the method as well as descriptions of its practical applications in various human and institutional settings.

Benson, D. *Recycle catalogue*. Nashville, Tenn.: Abingdon Press, 1975.

A collection of seven hundred ways in which people working with groups and meetings have adapted ideas and materials for their groups.

Burke, W. W., & Beckhard, R. *Conference planning* (2nd ed.). La Jolla, Calif.: University Associates, 1976.

Much new material—including seven completely new articles—supplements and updates the first edition's thorough discussion of the basic principles of conference planning. A must for the planner, whether he is working on his first or twenty-fifth conference.

Business Education Division, Dun & Bradstreet, Inc. *How to conduct a meeting* (Dun & Bradstreet business series 9). New York: T. Y. Crowell, 1970.

A meeting can be a vital communication tool, and this book was written to help people make the most of this tool. It covers planning, arrangements, feelings of people, audience involvement, and tools for evaluation.

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A book of prose, poetry, and thoughtful impressions and expressions about our current times. It is a useful book to quote in presentations and speeches.

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For persons responsible for planning larger meetings and those who are concerned with improving conference effectiveness.

Ford, G. A., & Lippitt, G. L. *Planning your future: A workbook for personal goal setting*. La Jolla, Calif.: University Associates, 1976.

A revision of the authors' earlier life-planning workbook, this is also a step-by-step workbook that guides the reader in planning and personal goal setting. It takes the individual through a sequence of tasks and exercises that aid in self-understanding and in planning both day-to-day and broad life goals more effectively.

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This book is particularly useful for meetings of which planning of future goals is the major purpose. It presents step-by-step designs to help a group move from formulating an image (a goal) to translating it into action.

Hein, P. *Grooks 1, Grooks 2, Grooks 3, Grooks 4, Grooks 5*. Garden City, N.Y.: Doubleday, 1966, 1968, 1970, 1971, 1973.

These five amusing and delightful books are full of drawings and poetry (called Grooks) that are very useful as themes for meetings, as kickoff quotes, or as illustrations of points you wish to make. Each Grook captures some truth about the human condition as it is seen by the author, a Danish optimist writer and scientist.

Leslau, C., & Leslau, W. *African proverbs*. Mt. Vernon, N.Y.: Peter Pauper, 1962.

Proverbs from all over Africa are delightfully apt for our culture and are useful as quotations.

Lippitt, G. L. *Visualizing change: Model building and the change process*. La Jolla, Calif.: University Associates, 1976.

A reprint of the 1973 edition, this volume, through 137 illustrations and diagrams, shows how to picture or visualize the process of individual, group, or organizational change through the use of models. The author provides a fascinating exploration of change models and case examples; he explains how models enable one to step outside the situation and see the changing environment that influences our behavior. Guidelines, history, steps, benefits, and limitations of model building are presented. Key behavioral science models provide a nonmathematical classic for students and practitioners of the change process.

Maidment, R., & Bronstein, R. *Simulation games: Designs and implementations*. Columbus, Ohio: Charles E. Merrill, 1973.

This is a short, helpful book covering simulations, simulation games, the history and uses of simulations, simulations and learning, and designing simulation games. It is a useful and informative book from which it is easy to adapt for different meetings and different purposes.

Manual for small meetings: Techniques to make small meetings produce results. Philadelphia, Pa.: Brill Communications, 1975.

A compendium of ideas, techniques, and procedures to help create and direct small meetings that are productive. Articles on leadership, participation, opening techniques, role playing, handling emergencies, and presentation techniques.

Miller, E. C. (Ed.). *Conference leadership*. New York: American Management Association, 1972.

A manual written to train persons in conference leadership. Identifies many of the traps and pitfalls that a leader may encounter.

Morrisey, G. *Effective business and technical presentations* (2nd ed.). Reading, Mass.: Addison-Wesley, 1975.

Provides the reader with a step-by-step method, as well as practical exercises, to help ensure effective presentations. Also provides help on the selection and use of audiovisual aids and work sheets for planning, presenting, and evaluating presentations.

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This book reflects the author's Black experience from the 1930's through the late 1960's. It is a beautifully written book that can be used to involve group members in thinking and discussion; it is also very quotable.

Pfeiffer, J. W., & Jones, J. E. (Eds.). *The annual handbook for group facilitators* (1972-1977). La Jolla, Calif.: University Associates 1972-1977.

Each of the six *Annuals* contains new structured experiences, instruments, lecturettes, theory and practice papers, resources, bibliographies, and book reviews. A balanced variety of resources for program design and implementation.

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This is a superb how-to-do-it tool for all persons who are concerned about improving the quality of leadership in groups. Over one hundred exercises are described with helpful diagrams. Short essays on theory are strategically distributed to back up each exercise technique. Excellent for an extended training course; convenient for quick reference; useful in any setting.

Reidel & Finn, Inc. *18 conference room quotations and sculptures*. New York: American Institute of Graphic Arts.

This is a beautiful exhibit of quotations accompanied by pictures of famous sculptures. They can be used to motivate meeting participants either by exhibiting them selectively or by reading the quotations.

Schindler-Rainman, E., & Lippitt, R. *The volunteer community: Creative use of human resources* (2nd ed.). La Jolla, Calif.: University Associates, 1975.

Two chapters in this book may be of particular interest to planners of meetings or conferences and trainers of trainers or staff. Chapter VII, "The Training of Trainers," deals with how to help trainees learn; it contains an illustrative trainership meeting design. Chapter IX illustrates interagency, community-wide planning meetings that evolve into a two-day community conference.

Schindler-Rainman, E., Lippitt, R., Millgate, I., & Olson, R. *Developing our volunteer community*. Tuxedo, N.Y.: Xicom, Inc., 1975.

A package containing four programmed cassette tapes, a leader's manual, and *The Volunteer Community*. Designed to be used with any audio-cassette recorder by any size group. Each section may be used separately or in a series of sessions. The package is structured as a professional development resource, a training device for staff, students, and volunteers, in small or large meetings, classes, conferences, or conventions.

Schrank, J. *The seed catalogue*. Boston: Beacon Press, 1974.

A guide to teaching/learning materials, this resource identifies many people, groups, books, films, tapes, records, games, and devices that can aid in provocation and education. Materials identified are usually comparatively inexpensive. For use with high school and adult learners.

This, L. *The small meeting planner*. Houston, Texas: Gulf, 1972.

Designed for those who plan meetings, seminars, workshops, conferences, and training activities for one hundred participants or less. Physical arrangements, table and chair constellations, and methods of evaluation are dealt with in depth.

Selected Publications

***Leadership and Social Change* (Second Edition, Revised and Enlarged)**

William R. Lassey and Richard R. Fernández, Editors

Most of the earlier 1971 volume (fourteen articles) is included in this 1976 revision, along with eleven new contributions from the best-known authors in the field. Reprints and original contributions provide an overview of the most thoroughly tested concepts about leadership behavior, the consequences of such behavior, and the application of the concepts to leadership situations.

6" x 9", 368 pages, paperbound

Making Meetings Work: A Guide for Leaders and Group Members

Leland P. Bradford

Written for people who lead groups, conduct meetings, and plan and lead conferences, this book approaches leadership through the needs and actions of individuals, the complexities of group behavior, and the problems inherent in reaching solutions and decisions.

6" x 9", 128 pages, paperbound

Facilitating Community Change: A Basic Guide

Donald R. Fessler

This book gives specific steps for organization, problem analysis, and problem solving in effecting positive change and describes the broad social factors affecting change efforts. In a pragmatic and comprehensive manner, it details every phase of organizing a community for change, obtaining participation and support, and maintaining involvement and accord.

6" x 9", 146 pages, paperbound

***The Volunteer Community: Creative Use of Human Resources* (2nd Ed.)**

Eva Schindler-Rainman and Ronald Lippitt

A useful resource, stimulus, and guide for staffs and volunteers in public and private agencies, organizers and leaders of cause movements, consultants, professors, business and labor leaders on use of volunteers, goals, methods and designs for training, and the role of administrators. Includes a comprehensive annotated bibliography of literature in the field of voluntarism.

6" x 9", 176 pages, paperbound

Identifying and Solving Problems: A System Approach

Roger A. Kaufman

Basic, yet vivid and entertaining, this book deals with identifying and solving problems using the technique of system analysis. It is particularly designed as a tool for the human relations professional who needs to convey a method for effective decision making to individuals and groups—or for anyone wanting to enhance personal skills in planning and doing.

9" x 6", 122 pages, illustrated, paperbound

Conference Planning (Second Edition)

W. Warner Burke and Richard Beckhard, Editors

Sixteen articles by leaders in the field are categorized according to different aspects of designing and conducting a conference and present a thorough overview of the basic principles of conference planning. Sections include planning, technology, special conferences, and training group discussion leaders.

6" x 9", 174 pages, paperbound

***Group Development* (Second Edition, Revised and Enlarged)**

Leland P. Bradford, Editor

This update of a classic resource on group interaction and development includes readings on group goals and trust, group dynamics, the individual in groups, group problems, roles of group members, hidden agendas, stereotypes, feedback and group self-evaluation, and group decision making. Original work includes the editor's analyses and an annotated bibliography. Among the contributors are Bradford, Benne, Bennis, Festinger, Gibb, Maier, G. Lippitt, R. Lippitt, and Zander.

6" x 9", 210 pages, paperbound

Write for a free catalog listing University Associates publications and training events.

About the Authors

Eva Schindler-Rainman, a specialist in community organization, has consulted with volunteer and community groups, private organizations, industry, governmental units, and UNESCO. She also teaches university courses and conducts seminars through professional organizations. Dr. Schindler-Rainman received her undergraduate and graduate training in psychology, adult education, and social work. She has written or contributed to over two hundred articles and books on voluntarism, community organization, communication, collaboration, adult and laboratory education, future planning, and creativity.

Ronald Lippitt is well known as one of the founders of the T-group and of National Training Laboratories. After graduate training in child development and social psychology, Dr. Lippitt helped to initiate the field of group dynamics. He has also been a university professor, a behavioral science researcher, and a group trainer. He has published numerous articles and books and is currently working in the fields of professional development for laboratory trainers, childhood education, staff development and training, community development, communication and collaboration within society, voluntarism, and multimedia resource development.

Jack Cole is region associate for the Mid-America Region of the National Council of the Young Men's Christian Associations. His degrees are in group-work education and counseling and guidance. For the past thirty years, he has been professionally involved in planning, designing, managing, participating in, and evaluating thousands of meetings. He presently works with boards, committees, staffs, and groups in planning and designing meetings and conferences. He also is responsible for the program development and value education objectives of the YMCA Mid-America Region.

About University Associates

University Associates is an educational organization engaged in international publishing and consulting in human relations training, research, and education. Along with a growing range of laboratory experiences, workshops, and clinics, University Associates offers custom-designed consultation in the areas of human relations training, leadership and management development, organization development, and community development. Typical clients include business, medical, industrial, governmental, religious, educational, and community organizations.

In addition to the Pfeiffer & Jones Series in Human Relations Training, University Associates publications have expanded to encompass such areas as criminal justice training, management and leadership, classroom education, minority and intergroup relations, growth groups, and psychotherapy. University Associates also offers tape-assisted learning programs in employee and team development, appraisal interviewing, effective interpersonal relationships, and listening skills.